



## **Peoplesoft Supplier Registration:**

**Requesting a Concur Expense Account to file Expense  
Claims for Visitors/Guests residing in Canada or the  
United States**



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### **Purpose**

To provide an on-line registration process for York community (delegates) to request a Concur Expense account on behalf of **an external individual who resides in Canada or the United States** for the purpose of submitting expense claims on their behalf.

Please **do not use this system** to register the following individuals:

- Current employees (faculty, staff) – Faculty and staff should file their expense claims directly in Concur.
- Retired faculty (YUFA or OHFA) claiming PER expenses – Retired faculty should file their expense claim directly in Concur.
- Past contract faculty claiming PER expenses – Contract faculty should file their expense claim directly in Concur.
- Current students – Students should file their expense claim using paper claim forms available at:  
[http://www.yorku.ca/finance/documents/ClaimforReimbursement\\_Receipts\\_Required\\_for\\_Meals\\_manual.pdf](http://www.yorku.ca/finance/documents/ClaimforReimbursement_Receipts_Required_for_Meals_manual.pdf)
- Suppliers who are billing the University for goods or services – Suppliers should include their out of pocket expenses on their invoices.
- Visitors residing outside Canada/United States – individual should file their expense claim using paper claim form and request for wire/draft.

### **1. Requesting access to the PeopleSoft Supplier Registration module**

Finance/UIT will grant access to the PSoft Supplier Registration module (“Supplier Registration”) to approved individuals. To request access to Supplier Registration, please obtain written approval from your manager and forward it to [venreq@yorku.ca](mailto:venreq@yorku.ca).

Upon approval, you will receive communication from Finance/UIT. You will be able to access Supplier Registration using your Passport York User ID and password.

### **2. Instructions for Delegates to register a visitor/guest using the PSoft on-line supplier registration module.**

- i. To access the Supplier registration module, go to:  
<https://finance.yorku.ca/FIN92PRD/signon.html>
- ii. Click on Main Menu and navigate to Suppliers > Supplier Registration > Register Suppliers/Visitors

i. **Step 1 – Welcome**

i. Please read the welcome section prior to proceeding.

Favorites | Main Menu > Suppliers > Supplier Registration > Register Suppliers / Visitors

Welcome Identifying Information Addresses Contacts Submit

Exit | Previous Next

**Welcome - Step 1 of 5**

Notice: You are requesting a Concur Expense account on behalf of an **external individual who resides in Canada or the United States** and who will require reimbursement of expenses incurred.

Please **do not** use this system to register the following individuals:

- Current employees (faculty, staff) – Faculty and staff should file their expense claims directly in Concur.
- Retired faculty (YUFA or OHFA) claiming PER expenses – Retired faculty should file their expense claim directly in Concur.
- Past contract faculty claiming PER expenses – Contract faculty should file their expense claim directly in Concur
- Current students – Students should file their expense claim using **paper** claim forms available at
  - [http://www.yorku.ca/finance/documents/ClaimforReimbursement\\_Receipts\\_Required\\_for\\_Meals\\_manual.pdf](http://www.yorku.ca/finance/documents/ClaimforReimbursement_Receipts_Required_for_Meals_manual.pdf)
- Suppliers who are billing the University for goods or services – Suppliers should include their out of pocket expenses on their invoices
- Visitors residing outside Canada/United States – individual should file their expense claim using paper claim form and request for wire/draft

For more information on how to file an expense claim for individuals listed above, please contact the Expense Desk (extension 44684).

To complete the registration, please fill in the information for each step of the registration process. Use the navigation buttons "Next" and "Previous" to move between steps or "Save for Later" to save your work to be resumed for later. Once you have provided all the required information, proceed to the "Submit" step where you may submit the request for Concur registration for consideration. You will receive an email confirmation shortly after submission.

For assistance in completing this registration, please contact Procurement Services (extension 30545).

Select an activity below: ?

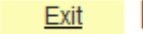
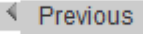
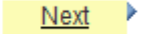
Start a new registration form  
What type of entity do you represent?  
 Individual

Continue from where you left

Exit | Previous Next

\* Required field

The registration form automatically defaults to “Start a new registration form” for an individual. If you have a saved or partially completed form you can select the “Continue from where you left” button.

ii. Click on the Next  |   to move forward to the next step of the form.

## ii. Step 2 – Identifying Information

- i. Enter the claimant's name in the Entity Name field using the format **LastName, FirstName** (note: there are no spaces after the “,”).

The screenshot shows a form with two main fields. The first is 'Entity Name' with a text input box and the instruction '(Last Name, First Name)'. Below it is a 'Classification' dropdown menu currently set to 'Concur Expense' with the note '(For Procurement Services Use Only)'. At the bottom left, there is a label '\* Supplier Short Name'.

If incorrectly entered, the pop up message below will appear outlining correct name format:

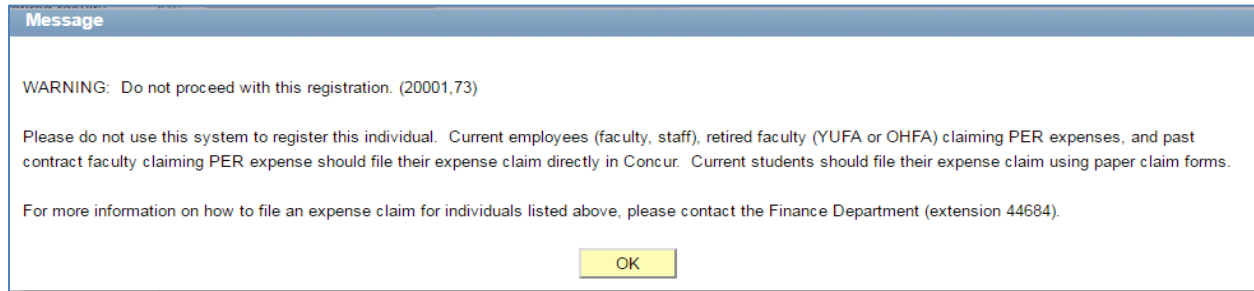
The message box is titled 'Message' and contains the following text: 'Name Field Format Error. Please reenter using the PeopleSoft standard name format. The entry for this field must be in the PeopleSoft standard name format: [lastname] [suffix],[prefix] [firstname] [middle name/initial]. The entry can contain alphabetic characters, spaces, periods, hyphens, and apostrophes. Valid entries might include: O'Brien,Michael; Jones IV,James; Phillips MD,Deanna Lynn; Reynolds Jr.,Dr. John Q.; Phipps-Scott,Adrienne; Knauft,Gunter.' There is an 'OK' button at the bottom center.

- ii. The Classification field defaults to “Concur Expense”. DO NOT CHANGE the classification.
- iii. Respond to questions 1 to 6. All questions must be answered in order to move forward to the next section of the registration.

This screenshot shows the 'Profile Questions' section of the registration form. It contains six questions, each with a dropdown menu for the answer. The questions are: 1. 'Is the claimant a current employee, retired faculty, past contract faculty, or current student?' 2. 'Is the claimant a current supplier of York University?' 3. 'Has the claimant ever received a reimbursement from the University?' 4. 'Where does the claimant reside?' 5. 'What is the required payment currency?' 6. 'Will the claimant be paid by cheque or direct deposit (EFT)?' Below the questions is a 'Comments' section with a text area and an 'Add Attachment' link. At the bottom, there are navigation buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'. A legend at the bottom left indicates '\* Required field'.

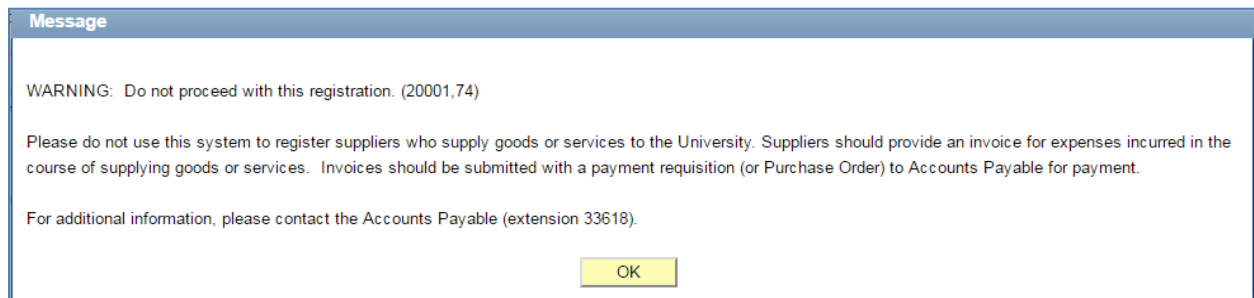
**Question #1** – Select **YES** or **NO** to indicate if the claimant is a current employee, retired faculty, past contract faculty, or current student.

Note: You should do not use this system to register current employees (faculty, staff), retired faculty (YUFA or OHFA), past contract faculty claiming PER expense, or current students. If you select YES, you will receive the warning below:



**Question #2** – Select **YES** or **NO** to indicate if the claimant is a current supplier of York University.

Note: You should do not use this system to register suppliers who are billing the University for goods or services. If you select YES, you will receive the warning below:



**Question #3** – Select **YES** or **NO** to indicate if the claimant has ever received a reimbursement from the University.

**Question #4** – Select **Canada** or **USA** to indicate the claimant's country of residence.

**Question #5** – Select **CAD** or **USD** to indicate the reimbursement currency.

Note: Individuals who reside in Canada will be reimbursed in Canadian dollars. Individuals who reside in the United States will be reimbursed in US dollars. Please ensure the currency selected matches the country of residence indicated above.

**Question #6** – Select **Cheque** or **Direct Deposit (EFT)** to indicate the reimbursement method.

Note: Only Canadian residents are eligible to receive their reimbursement by EFT. You will not be able to select the EFT option if the answers to question #4 and #5 are not Canada and CAD, respectively.

- iv. If you selected EFT as the reimbursement method, you must attach a copy of the void cheque. To attach a void cheque, click “Add Attachment”.

**Unique ID & Company Profile**

\* Internal Visitor ID Number X900000318

Entity Name  (Last Name, First Name)

Classification  (For Procurement Services Use Only)

\* Supplier Short Name

**Profile Questions**

\* Please do not use this system to register current employees (faculty, staff), retired faculty (YUFA or OHFA), past contract faculty claiming PER expense, or current students.  
Is the claimant a current employee, retired faculty, past contract faculty, or current student?

\* Please do not use this system to register suppliers who are billing the University for goods or services.  
Is the claimant a current supplier of York University?

\* Has the claimant ever received a reimbursement from the University?

\* Please do not use this system to register an individual who resides outside of Canada or the United States.  
Where does the claimant reside?

\* Individuals who reside in Canada will be reimbursed in Canadian Dollars. Individuals who reside in the United States will be reimbursed in US Dollars. Please ensure the currency selected matches the country of residence indicated above.  
What is the required payment currency?

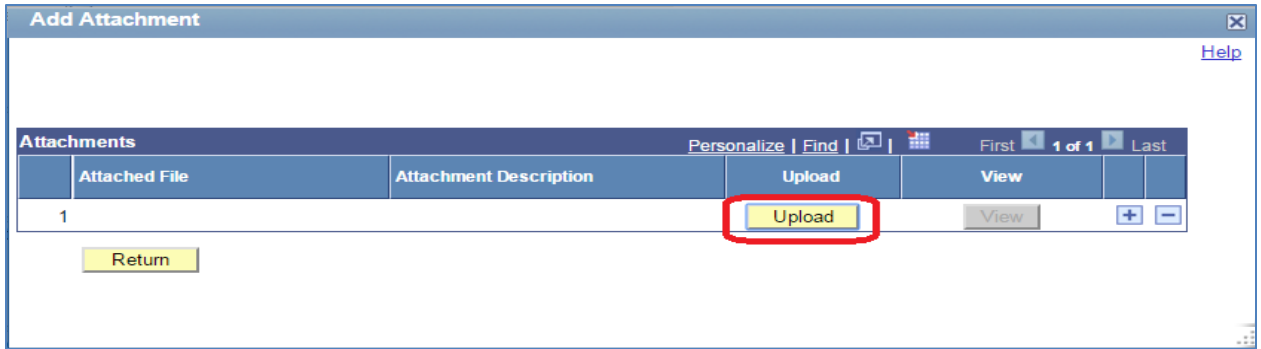
\* Canadian residents are eligible to receive their reimbursement by direct deposit or EFT (a scanned copy of void a cheque is required).  
Will the claimant be paid by cheque or direct deposit (EFT)?

[Add Attachment](#)

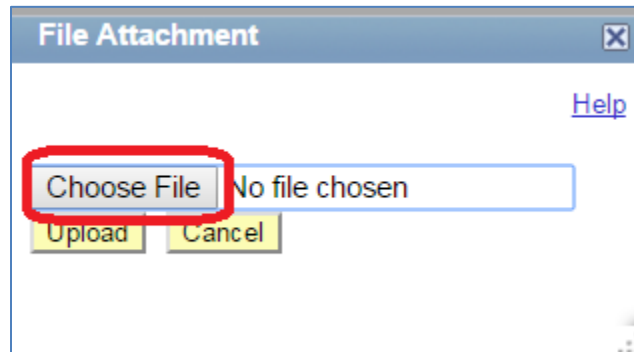
**Comments**

Exit Save for Later | Previous Next

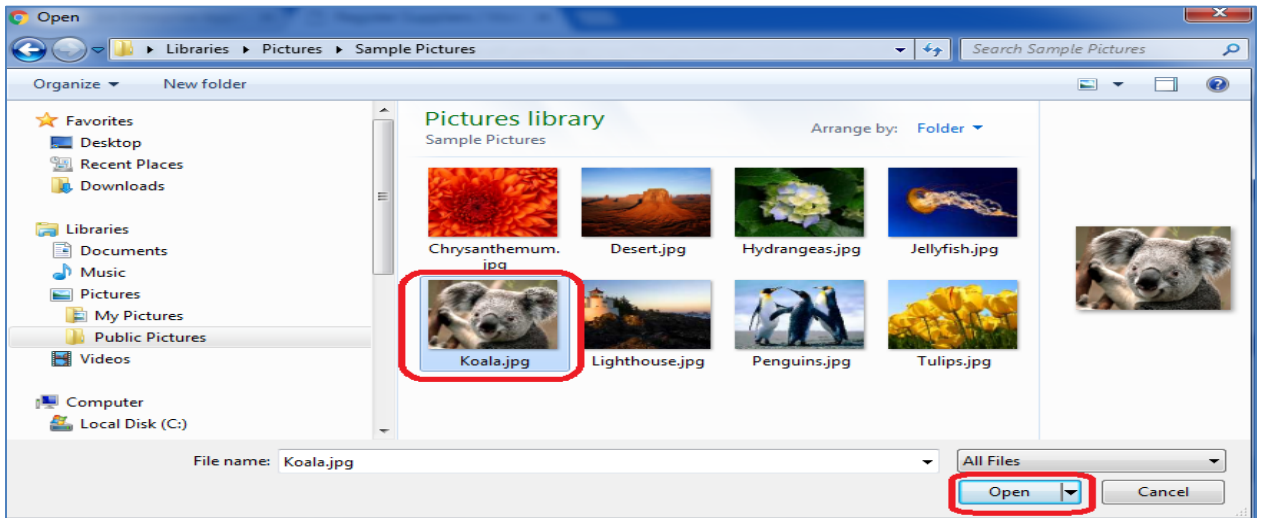
In the “Add Attachment” window, click “Upload”.



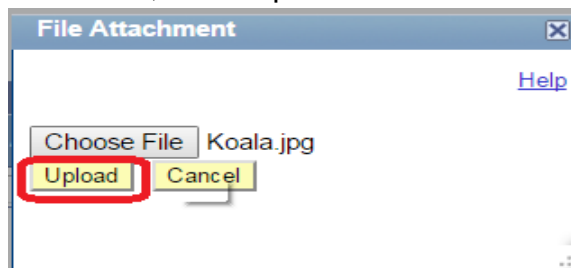
In the "File Attachment" window, click "Choose File".



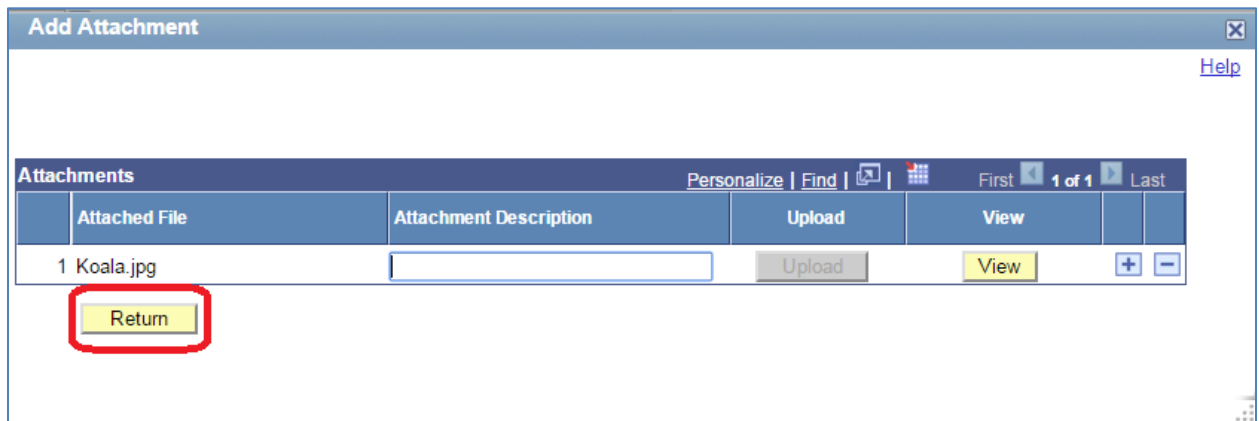
Navigate to the file location, select the file, and click "Open".



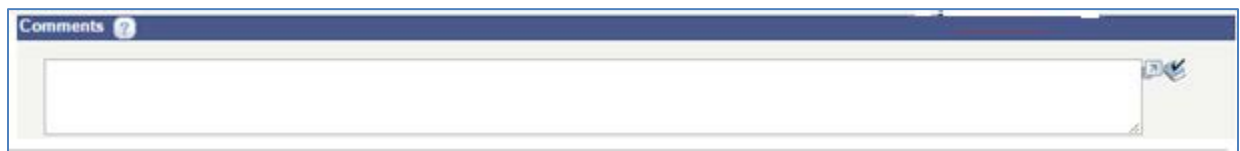
In the "File Attachment" window, click "Upload".



In the “Add Attachment” window, click “Return”.



- v. Enter any additional comments in the Comments field.



- vi. Click on Next   |   to move to the next section of the registration.



### Step 3 - Addresses

- i. Enter the claimant's primary address.

Welcome Identifying Information **Addresses** Contacts Submit

Exit Save for Later | Previous Next

Addresses - Step 3 of 5

Primary Address ?

\* Country CAN Canada

Address 1

Address 2

Address 3

City

County Postal

Province

Visitor Email ID

Concur ID X900000111@yorku.ca

Exit Save for Later | Previous Next

The primary address should consist of at least:  
Country (CAN or USA), Address 1, City, Province or State, Postal Code or Zip and Visitor Email ID.

- ii. Click on Next **Exit Save for Later | Previous Next** to move to the next section of the registration.

### iii. Step 4 – Contacts

- i. The contact screen will be prepopulated with your contact information:

Add Contacts Help

Contact Information ?

* First Name	Jane	<input type="checkbox"/> Primary Contact
* Last Name	Administrator	
Title		
* Email ID	admin@yorku.ca	
* Telephone	416/736-2100	Ext
Fax Number		
Contact Type	York Department Contact	

OK

Click OK.

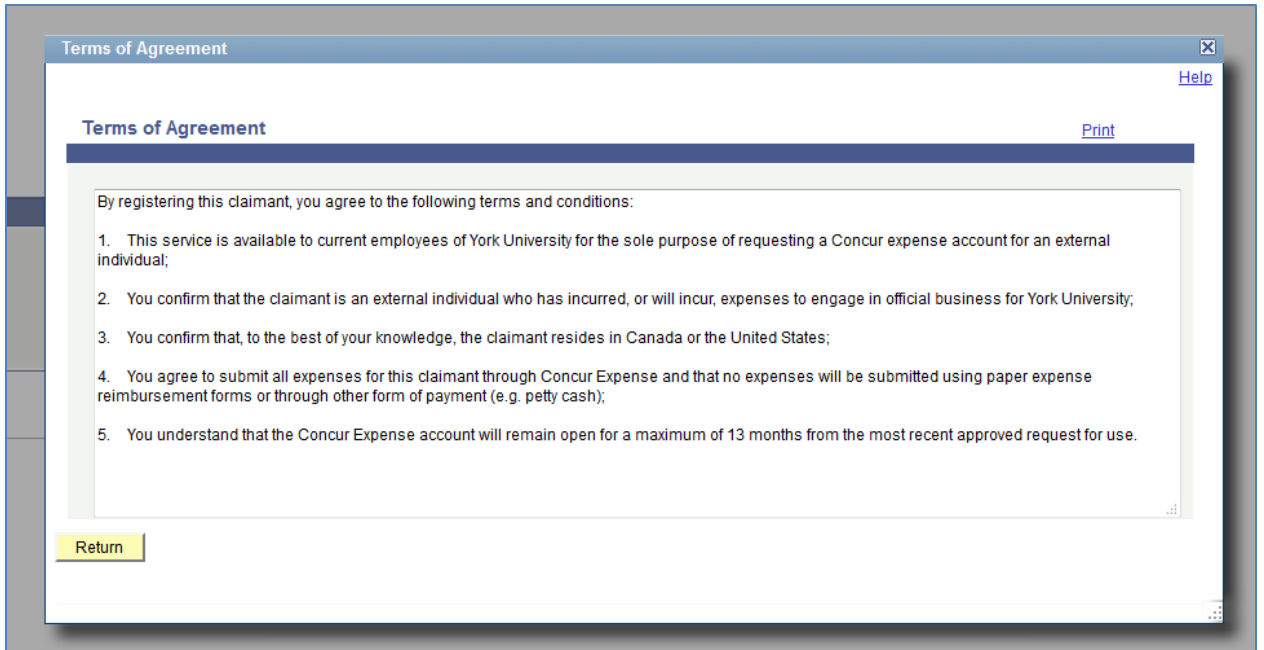
- ii. Verify the internal York contact. The contact should be your contact information (i.e. same as the delegate who is creating the registration).

iii. Click on Next [Exit](#) [Save for Later](#) | [Previous](#) [Next](#) to move to the next section of the registration.

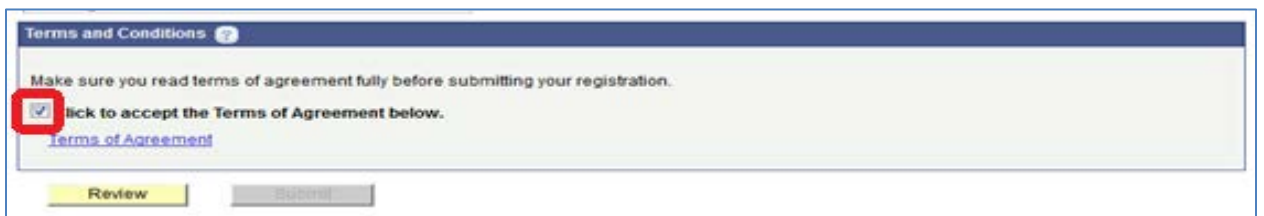
**iv. Step 5 – Submitting Registration**

i. Before submitting the registration request, you must review the Terms of Agreement.

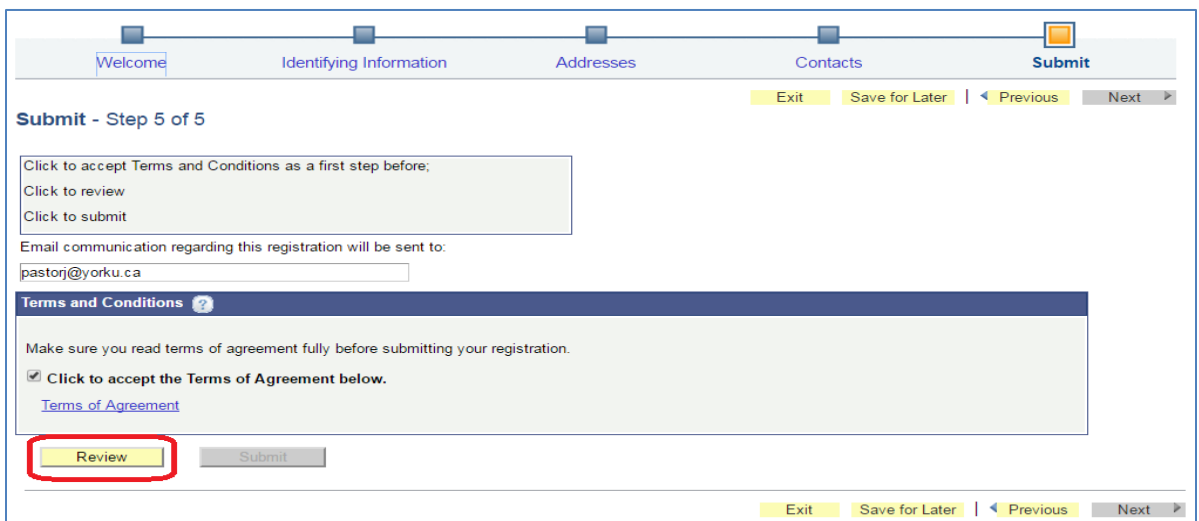
To review the Terms of Agreement, click on “**Terms of Agreement**” Link.



- ii. After reading the Terms of Agreement, click Return. Check the box indicating that you “Accept the Terms of Agreement”.



You must review the information you provided before the “Submit” button is made available. To review your submission, click the “Review” button.



iii. Review the information you entered.

Review Page [Help](#)

**Supplier Registration Info**

Internal Visitor ID Number			
Entity Name	Charon, Marc		(Last Name, First Name)
Classification	Concur Expense		
Short Supplier Name	CHARONMARC		

**Identification Classification**

Internal Visitor ID Number	X900000310		
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**Profile Questions**

* Please do not use this system to register current employees (faculty, staff), retired faculty (YUFA or OHFA), past contract faculty claiming	No		
* Please do not use this system to register suppliers who are billing the University for goods or services.	No		
* Has the claimant ever received a reimbursement from the University?	No		
* Please do not use this system to register an individual who resides outside of Canada or the United States.	Canada		
* Individuals who reside in Canada will be reimbursed in Canadian Dollars. Individuals who reside in the United States will be	CAD		
* Canadian residents are eligible to receive their reimbursement by direct deposit or EFT (a scanned copy of void a cheque is required).	Cheque		

[View Attachment](#)

**Address Information**

* Primary Address			
Description	Main Address		
Country	CAN Canada		
Address 1	123 Fred Drive		
Address 2			
Address 3			

You must scroll to the end of the page and click "Return" before you are able to submit your registration request:

Email ID	pastorj@yorku.ca
Requested User ID	SMITHWILLI-001
Description	Smith, William
Language Code	English
Time Zone	
Currency Code	Canadian Dollar

**Phone Information**

Type	Prefix	Telephone	Ext
Business Phone		416/736-2100	

**Comments** ?

[Return](#)

- iv. The submit button will now be available. Click “Submit”.

The screenshot shows a registration progress bar at the top with five steps: Welcome, Identifying Information, Addresses, Contacts, and Submit. The 'Submit' step is highlighted with an orange square. Below the progress bar, the page title is 'Submit - Step 5 of 5'. Navigation buttons include 'Exit', 'Save for Later', 'Previous', and 'Next'. A text box contains instructions: 'Click to accept Terms and Conditions as a first step before;', 'Click to review', and 'Click to submit'. Below this, an email address 'pastorj@yorku.ca' is entered in a field. A 'Terms and Conditions' section follows, with a checkbox checked and the text 'Click to accept the Terms of Agreement below.' and a link to 'Terms of Agreement'. At the bottom, there are 'Review' and 'Submit' buttons, with the 'Submit' button circled in red. A second set of navigation buttons is at the very bottom.

- v. Upon successful submission the delegate will receive the following message.

The screenshot shows a confirmation page titled 'Registration Submit Details'. It features a green checkmark icon and the text 'Submitted' followed by 'You have successfully submitted your registration.' Below this, it displays 'Your registration ID: 000000022' and 'Any email regarding the registration status will be sent to: braym@yorku.ca'. A link 'Register New Supplier' is provided at the bottom.

- vi. At any time during the registration process, prior to submitting the registration request, you may save the registration request and access it at a later date. To save the registration request, click “Save for Later”.

A close-up of the navigation buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'. The 'Save for Later' button is circled in red.

### 3. Registration Approval and Email Notifications.

Procurement Services will be notified by email at [venreq@yorku.ca](mailto:venreq@yorku.ca) of any pending reviews/approvals. Registration status (approvals, denials, and request for more information) will be communicated by email.

#### Sample Email Notifications

Email received by delegate upon submitting registration

Your supplier registration form, registration ID 0000000193 has been submitted for approval.

You will be notified at this email address of any changes in your registration status.

If you have any questions or feedback regarding your registration ID 0000000193, please call Procurement Services at Ext. 30545 or email [venreq@yorku.ca](mailto:venreq@yorku.ca).

Thank you.  
York University