



# Electronic Submission of Expense Reports In Concur

## A Guide for Students

(Faculty of Graduate Studies Thesis/Dissertation  
Production Cost)

SAP Concur 

### WHERE TO GET HELP?

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

**Local Faculty/Department Support – for policy and functional assistance**

Faculty of Graduate Studies – [gsawards@yorku.ca](mailto:gsawards@yorku.ca)

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

## NOTE:

The University issues reimbursement payments to active students via direct deposit. Please visit your student account by following the instructions below and register for direct deposit, so that the University can electronically process your payment directly to your bank account.

1. Go to **sfs.yorku.ca**
2. Click on "**Create or update my banking information**"
3. Log in with your **Passport York ID and Password**
4. Select "**My Banking Information**" and follow the instructions

Once you have successfully set up your direct deposit information, York University will make a small deposit (between 1 and 10 cents) to your bank account which you will be required to verify on your student account. All future payments will be made by direct deposit as well.

If you have any questions or require assistance with registering for direct deposit, please contact Student Financial Services at 416-872-YORK (9675)

This guide is intended for Students who are **currently** enrolled with York University.

To file a claim using Concur, please follow the instruction below:

## STEP 1: ACCESSING YOUR CONCUR ACCOUNT

- Go to the York University website ([www.yorku.ca](http://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** under the **Faculty & Staff Quick Links** found on the right hand side of your screen
- Login using **your Employee Passport York\***

\*Your student Passport York account is NOT the same as your employee Passport York ID. If you have not set up your Employee Passport York and Central Email Account, please refer to the online instructions by clicking the Passport York and Central Email Account link on the Computing for Faculty & Staff page at:

<http://staff.computing.yorku.ca/faculty-staff/passwords-passport-york-access/>

*You will be launched into your Concur Homepage*

## 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:

**GO MOBILE!** – Download the Concur Mobile App for Apple / Android smartphone or tablet and upload images directly to your expense report. **It does not support Windows or Blackberry mobile devices**

OR

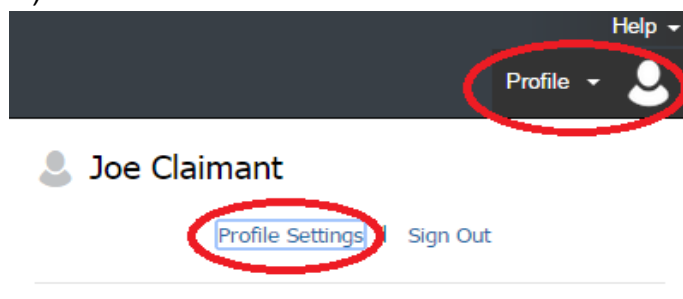
**E-MAIL RECEIPTS TO YOUR CONCUR ACCOUNT (AVAILABLE RECEIPTS)** – Snap pictures of your receipts using your smartphone or tablet and email the images from your **verified** email address to [receipts@concur.com](mailto:receipts@concur.com). See below on how to create a verified email address. You can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

OR

**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.

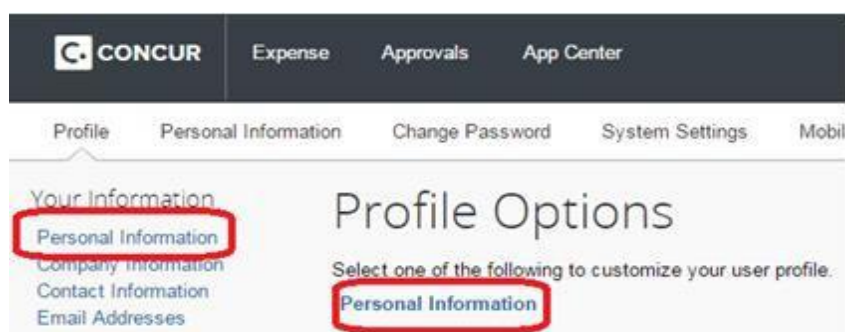
- The **email verification** process is a simple, one time process. Please follow the steps below to verify your email address:


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




- Click **Profile Settings**

- Click either of the **Personal Information** links. **Personal Information page is launched**



4. Scroll down to the **Email Addresses** section and verify your York University email address by clicking **How do I verify my email address?** 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 **Student** (@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: CREATE AN EXPENSE REPORT


- Click the  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



Hello, Test






- Click on **Start a Claim** 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)

**Helpful hint:** 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.

Create a New Expense Claim

Claim Header

Report Name Thesis/Dissertation Production Cost	Report Creation Date 16/04/2020	Expense or Travel Locations(s)  Toronto	Travel Begin Date  08/04/2020	Travel End Date 08/04/2020
Business or Research Purpose Thesis/Dissertation Production Cost	Additional Information / Report Comments	Research Affiliation (Title, Institution) 	Financial Reporting Category Student	
Fund 1 (200) Operating Fund	Cost Center Category 2 (FUND 200) Operating	Cost Center Number/Description 3 (126200) GS-CUPE Unit 1 Th	Activity	Time
Location				
Department York University		Report Key		

- For the purpose of Thesis/Dissertation Production Cost, please enter
  - Report name: **Thesis or Dissertation Production Cost** whatever applies to you
  - Expense or Travel Location: location on your receipts where printing and/or binding is done (example: Toronto, etc.)

- Travel Begin and Travel End Date: Date on the Receipt, if there are multiple receipts use oldest receipt as Travel Begin and latest as Travel End date
- Financial Reporting Category: select STUDENT
- Fund: (200) Operating Fund
- Cost Centre Category: (Fund 200) Operating
- Cost Centre Number/Description: (126200) GS-CUPE Unit1 Thesis
- Always enter ACTIVITY CODE: for your activity code ask yidan1@yorku.ca

After completing the Report Header, click . You will be launched into your **Expense Report**.

## STEP 4: ADD YOUR RESEARCH 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 the appropriate expense you are claiming “Printing & Photocopying”.
- 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.

New Expense Complete all mandatory fields as indicated by a red bar Available Receipts

Expense Type Parking	Financial Reporting Category Student	Transaction Date 09/01/2015	Select date at which expense has incurred	
Business Purpose Attended Conference	Comment		Enter amount including all taxes and gratuities	
Vendor Name	City Toronto, Ontario	Payment Type Claimant Paid	Amount 25.00	CAD
Approved Amount Leave Blank				
Fund (500) External Sponsored Re	Cost Center Category (CIHR, NSERC, SSHRC & Otr	Cost Center Number/Description (590990) Zeno, Angela - AccF	Activity	
Time	Location	Affiliation (Title, Institution) Grad Student		
Tax Posted Amount				

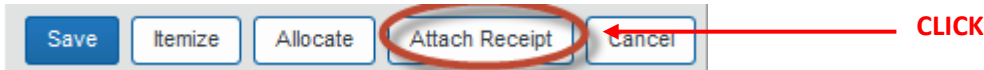
**IMPORTANT!** Each transaction should be entered under a separate expense line with the related receipt image attached. For example, if you have 2 printing receipts, it should be entered as 2 separate expense lines.

- For additional training on how to complete specific expense forms (such as hotel, meals, hospitality, etc.), please refer to the online training material at:

## STEP 5: 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 Available Receipts (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  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 Step 5 and 6 to add additional expense lines and images by selecting different expense type like Airfare, Office Supplies, etc. if applicable.

## STEP 6: SUBMIT YOUR EXPENSE REPORT

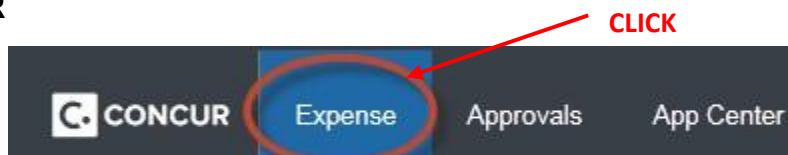
After you have reviewed your **Approval Flow** you are now ready to submit the expense report for approval

- Click on  button
- After reading the declaration, click on  button within the **Final Review** box.
- Click on  button within the **Approval Flow** screen.

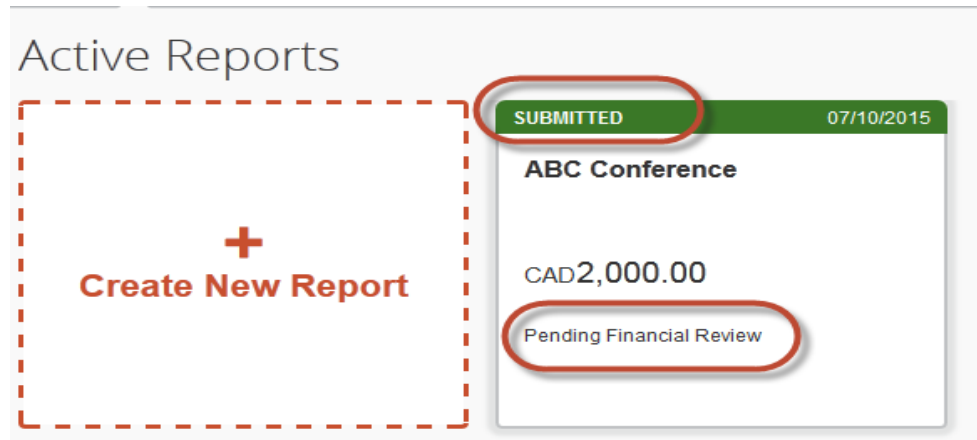
*Your expense report has now been submitted to the Finance Department and the Approver that you have designated in Step 7.*

## STEP 7: TO CHECK THE STATUS OF YOUR EXPENSE REPORT

- Navigate to the **Expense page** by clicking on **Expense** at the top of the browser, next to the **CONCUR**

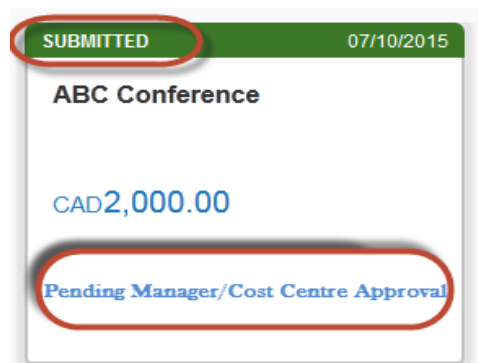


- You can check the current status of your expense report at any time displayed under the **Active Reports** section. The active expense reports will appear as tiles in this section. On each tile you will see the name of your report, amount of the claim, current status, and recent comment



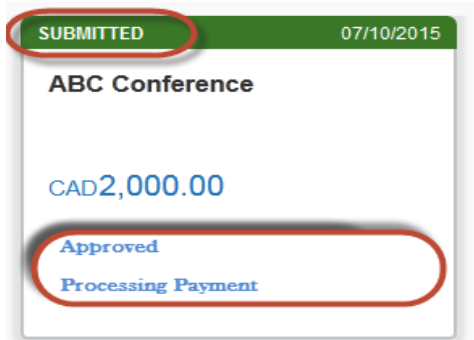
The above expense report status indicates that the expense report named “ABC Conference” has been **Submitted** and is currently **Pending Financial Review** (i.e. the expense report is **with the Finance Department** for review). All expense reports go through a Financial Review before it is approved.

- Once Finance approves the expense report the status changes to **Pending Manager/Cost Centre Approval** as shown below.



This indicates that the expense report is now **with your Approver** for the final approval.

- If your expense report status **Pending Manager/Cost Centre Approval** remains unchanged for several days, please send a reminder to your Approver to log into his/her Concur account and approve your expense report. **The Approver should follow Step 10 in the next section to approve the expense report.**
- Finally once your expense report has been completely approved and has been sent for payment processing you shall see the following status **Approved Processing Payment.**



**IMPORTANT!** If your claim has been returned from Finance or from your Approver for additional information or to make changes, you will receive an email notification **to your student email address** that your report has been returned. Please log into Concur and make the necessary changes.

**DO NOT FORGET to resubmit** your report after the changes are made. To resubmit your report, click

Submit Report