

NOTE:

The University issues reimbursement payments to active students via direct deposit. If you don't have direct deposit set up, 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)
- 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*** credentials.
You will be launched into your Concur Homepage

*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/>

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**

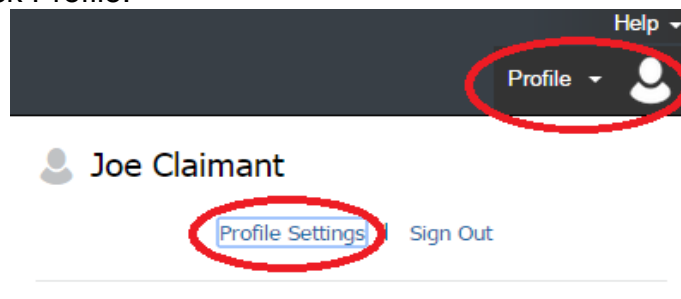
OR

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. 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.

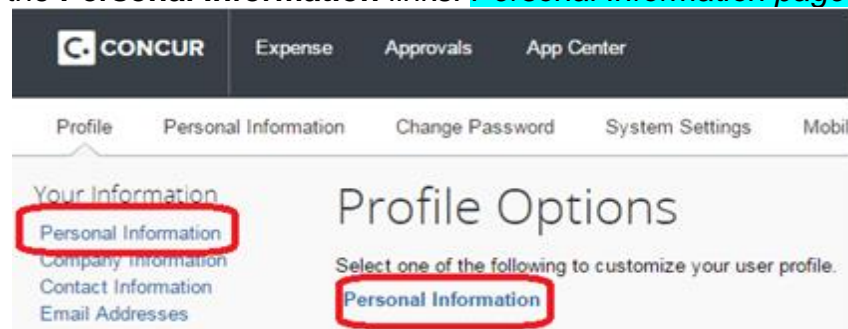
OR


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:
 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 **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 follow 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 **Employee** or **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 **SAP 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



Hello, Test



00
Required Approvals

00
Available Expenses

01
Open Reports

00
Cash Advances

- 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)

Create a New Expense Report

Report Header

| | | | |
|---|---|--|--|
| Report Name ABC Conference | Report Creation Date 09/29/2015 | Travel Destination (s) Pittsburgh, PA | Travel Begin Date 09/01/2015 |
| Travel End Date 09/05/2015 | Select this from the drop down list. | | |
| Business Purpose Attended Conference | Additional Trip Details (if required) Presented a poster related to XYZ research | Affiliation (Title, Institution) Grad Student | Financial Reporting Category Student |
| Fund (500) External Sponsored Re | Cost Center Category (CIHR,NSERC,SSHRC & Otr | Cost Center Number/Description (590990) Zeno,Angela - AccF | Activity Leave Blank if no activity code used |
| Time Leave Blank | Location Leave Blank | Use drop down arrow to select the appropriate granting agency | |
| Department York University | Report Key | Enter the 6 digits cost center number based on individual grants | |

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.

- Ask the individual to whom you report to provide you with the Fund, Cost Centre Category, Cost Centre Number/Category. The information on the next section may be helpful, but claimants are **REQUIRED** to confirm this information with the individual that will be approving your expense report.
- For Research Cost Fund and, please enter
 - Fund: (200) Operating Fund
 - Cost Centre Category: (Fund 200) Operating
 - Cost Centre Number/Description: (160202)

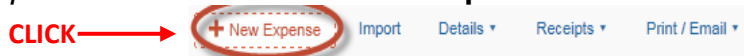
You will also be required to enter an Activity Code – an Activity Code will be provided to you in the Notice of Award.

After completing the Report Header, click **Next >>**. 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.

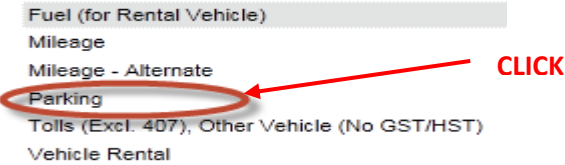
- If the New Expense listing does not appear, locate the *menu bar* below your *expense report name* and click the **New Expense** icon



- Scroll through the expense type listing and select the appropriate expense you are claiming.

Example: **Parking**

Automobile Expense



- 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.

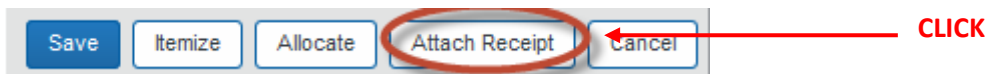
IMPORTANT! Each transaction should be entered under a separate expense line with the related receipt image attached. For example, if you have 3 parking charges, it should be entered as 3 separate expense lines. However, your personal meal “Meals/Per Diem Allowance” can be grouped on a daily basis.

- For additional training on how to complete specific expense forms (such as hotel, meals, hospitality, etc.), please refer to the online training material at: <https://emplearn.yorku.ca/ConcurExpense>

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

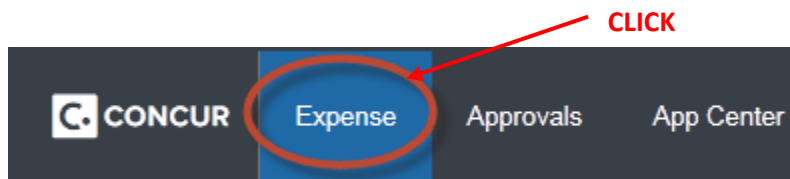
- Click on  button
- After reading the declaration, click on  button within the **Final Review** box.
- Click on  button within the **Approval Flow** screen.

Note: Please select one of the approvers below before submitting your report:

1. Lindsay Gonder

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

Active Reports

The screenshot shows a 'Create New Report' button in a dashed red box on the left. On the right, a report card for 'ABC Conference' is displayed. The card has a green header with 'SUBMITTED' and the date '07/10/2015'. The report title is 'ABC Conference', the amount is 'CAD2,000.00', and the status is 'Pending Financial Review'. Red circles highlight the 'SUBMITTED' status and the 'Pending Financial Review' status.

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.

The screenshot shows the report card for 'ABC Conference' with the status 'Pending Manager/Cost Centre Approval'. The header remains 'SUBMITTED' and '07/10/2015'. The amount is 'CAD2,000.00'. A red circle highlights the 'SUBMITTED' status, and a red oval highlights the 'Pending Manager/Cost Centre Approval' status.

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.**

The screenshot shows the report card for 'ABC Conference' with the status 'Approved Processing Payment'. The header remains 'SUBMITTED' and '07/10/2015'. The amount is 'CAD2,000.00'. A red circle highlights the 'SUBMITTED' status, and a red oval highlights the 'Approved Processing Payment' status.

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 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](#)