

**Submit a Concur Expense Report Prepared by the SSC**

**Navigation:** Wolverine Access → Faculty & Staff → University Business → Travel & Expense (Concur)  
You will need to log-in with your unqname and UMICH password

**Description:** This document describes how to submit an expense report that was prepared by the SSC to your approver. System notifications come from the sender *ServiceDesk*, which has an email address of: [sharedservices@umich.edu](mailto:sharedservices@umich.edu)

**Access Concur**

The **email** that you receive will contain a **link**, you may click that link and then enter your unqname and UMICH password – or you may follow the **navigation** at the top of this document, to end up in the same place.



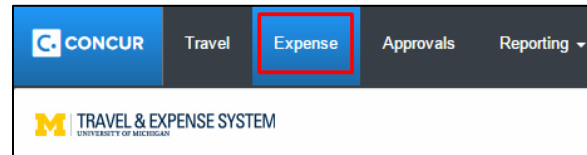
At left is an example of the System-generated email that you will receive from [sharedservices@umich.edu](mailto:sharedservices@umich.edu)

You will notice the **Report Name** and **Report Dates** are listed, as well as the **link** to login to the Concur Travel & Expense System


**Concur – The Expense Pane**

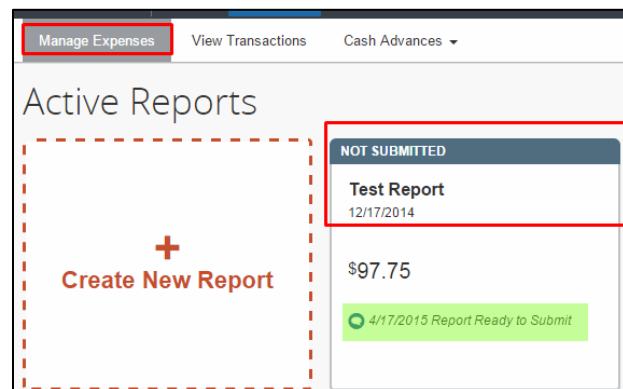
Once logged in to **Concur**:

- ❖ Click on the **Expense** tab



Once in the **Expense Tab**:

- ❖ Under **Active Reports**, your recent reports will be listed
- ❖ Notice the medium-blue border around the report at right, and the text **“Not Submitted”** at the top
- ❖ **Double-check** that you are submitting the correct expense report (*in the event that you have more than one that are unsubmitted*)
- ❖ Also notice the **comment** at the bottom of the report box (highlighted in light green) – which appears next to the  **comment icon**



**Method 1: Review Expense Report Line(s) by Clicking on the Individual Line**

- ❖ **Verify** that the Shortcode(s) is appropriate for the expense(s) (**Allocations**)
- ❖ **Review** any line **Comment** (ie: explanations of out-of-policy transactions, additional transaction details, et al.)

**Verify** the following totals, as appropriate:

- ❖ **Personal Expenses** (not eligible for reimbursement or payment by U-M)
- ❖ **Amount Due Employee** (reimbursement)
- ❖ **Amount Due Company Card** (P-Card expenses)
- ❖ **Total Paid By Employee** (amount you owe to the U-M, to be deducted from your next paycheck)

Example of expense line items in an expense report:

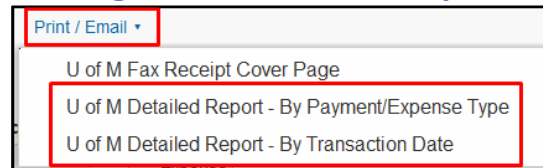
Expenses				
<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	04/14/2015	Travel Airfare (623500 or 62361 Virgin America, Los Angeles, Cal	\$239.10	\$239.10
<input type="checkbox"/>	03/18/2015	Fixed Meals (623528 or 623642 Orlando, Florida	\$42.00	\$42.00
<input type="checkbox"/>	03/18/2015	Travel Taxi Fare (623542 or 623 Mears Transportation Inc, Orland	\$80.00	\$80.00

Email [ExpenseReports@umich.edu](mailto:ExpenseReports@umich.edu) to request additional edits, if they are needed

**Method 2: Review Expense Report by Viewing the UM Detailed Report**

For this method, click on the **Print/Email** link, and select either the **U of M Detailed Reports**:

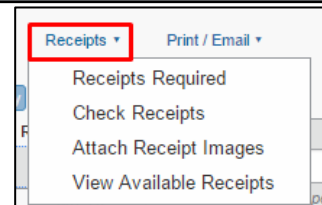
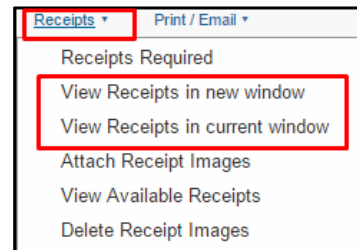
- ❖ **By Payment/Expense type**
- ❖ **By Transaction Type**



**Review Required Receipts**

**Verify** that delegates or SSC staff have attached all of the required receipts to the report

- ❖ From the **Receipts** hyperlink, select **View Receipts in a New Window**



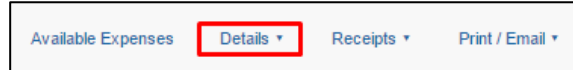
You will also need to view the receipts attached to each **line item**. *If no receipts are attached, the View options do not appear, as illustrated at right*

- ❖ **Verify** that receipt images are **applicable** to the individual line items – and are **legible**
- ❖ **Click Close** to exit the window, when completed

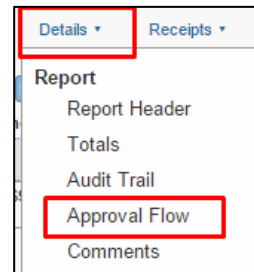
**If a receipt image is inaccurate or illegible, email the Shared Services Center at [ExpenseReports@umich.edu](mailto:ExpenseReports@umich.edu) with accurate and/or legible receipts**

### Approvers & Adding Additional Approvers

Some departments and/or certain expenses may require **additional approvers** to be added to an expense report - to add/subtract/change the approvers:



- ❖ From the **Details** hyperlink, select **Approval Flow**

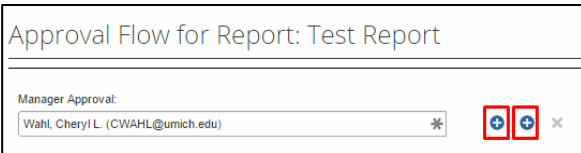


To add an approver **AFTER** the listed Manager Approval

- ❖ Click the **+** add a row icon (Left icon)

To add an approver **BEFORE** the listed Manager Approval

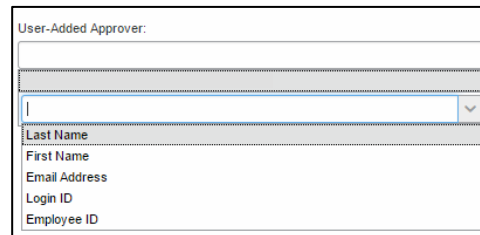
- ❖ Click the **+** add a row icon (Right icon)



To delete the entire row, click the "x" on the right

**Adding** an approver will add a **User-Added Approver** field

- ❖ **Click** in this **field**
- ❖ **Click** the **Down Arrow**
- ❖ **Select** how you wish to search for your approver
- ❖ Supported fields include: *Last Name, First Name, Email Address*
- ❖ Enter your parameters
- ❖ **Select** the person you wish to add to the **Approval Flow**, and click **Save Workflow**



## Submit the Expense Report

When you are ready to submit the report

- ❖ **Click *Submit Report***

Several boxes will appear, and you will have to click through all of them to finish submitting your expense report

The **Final Review** box will appear first

- ❖ This is an electronic signature, verifying that all expenses are appropriate

If there are **receipts required** on the report, that have not had individual receipts added at the line level, you will also see the **Reminder: Receipts Required!** notice

Expense	Date	Amount
Travel Airfare (623500 or 623614) Delta Air Lines, Ann Arbor, Michigan	12/03/2014	\$800.00

Next, you will have to confirm the **Approval Flow** (again)

The last box will give you the **Report Totals**

## Remember to Log Off

Log out of **Concur**  
Log out of **Wolverine Access**, and  
Log out **again** to **un-authenticate** credentials from all University-enabled Web sites

Expense Report	
Report Total :	\$8.05
Less Personal Amount :	\$0.00
Amount Claimed :	\$8.05
Amount Rejected :	\$0.00

Company Disbursements	
Amount Due Employee :	\$8.05
Total Paid By Company :	\$8.05

Employee Disbursements	
Amount Owed Company :	\$0.00
Total Owed By Employee :	\$0.00