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 uniquename 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

**Access Concur**

The email that you receive will contain a link, you may click that link and then enter your uniquename 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

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:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2015</td>
<td>Travel Airlines (623506 or 62351)</td>
<td>$230.10</td>
</tr>
<tr>
<td>06/28/2015</td>
<td>Fixed Meals (623616 or 623642)</td>
<td>$42.00</td>
</tr>
<tr>
<td>07/02/2015</td>
<td>Travel Taxi Fare (623642 or 623646)</td>
<td>$80.00</td>
</tr>
</tbody>
</table>

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 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

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