COLUMBIA UNIVERSITY
Weatherhead East Asian Institute

CONCUR TIPS AND SUGGESTIONS

✓ Adding Receipts

Receipts must be added *individually* to the expense report for non-travel expenses of $50 or more. Upload each receipt separately. Or upload receipts by sending them to receipts@concur.com.

✓ Adding A Missing Receipt Affidavit

When viewing the Expense list in your Expense Report, where one or more Expense items are missing receipts, click the Manage Receipts drop down menu and select Missing Receipt Declaration. Then, Select the checkboxes for the Expense Items missing receipts and click Accept & Create. The Receipt column displays the Missing Receipt Declaration icon.

✓ Adding Attendees

For meetings and events, users are required to list the name of each attendee if 10 or fewer, or the attendee count for events of 11 or more attendees, and their relationship to the University.

✓ Saving Frequently Used Chart String Allocations

Please click **here**   Saving ChartString Allocations as a Favorite (1).pdf   to find a step-by-step guide.

✓ Choosing an Initial Reviewer on an Expense Report

After you complete your Expense Report, click the Submit button, then click Accept & Continue and Submit Report on the proceeding windows. If you require an Initial Reviewer, the Edit Approval Flow window appears. **Enter an asterisk "*"** in the Initial Reviewer field. The names of all the available Initial Reviewers for your Department appear. Select an Initial Reviewer from the list and click Submit.

✓ Querying past approved Reports/Receipts

Select the Approvals tab on the top header, then click Reports. Click View to see the drop-down menu and select Reports You Approved This Year.

✓ Updating a Report Header to Route to WEAI for Approval

For departments outside of WEAI, they will need to enter the below information in the "report header" field if they are using our chart string and require approval: (1) Type of Report: CU **Business Expenses** (2) School: A&S Core – Interdisciplinary **(410000X)** (3) Division: A&S Institutes **(41NS00X)** (4) Sub-division A&S Weatherhead E Asian Inst **(410900X)** (5) Admin Department **(4109102).**

✓ Checking Approval Status of Your Expense Report

Log into Concur and click the Expense tab. Your Active Reports (currently being worked on or submitted into workflow) will appear. Click the Expense Report you want to view. Click the Report Details dropdown and select Report Timeline. The Report Timeline screen displays the Approval Flow and the Report Summary showing the Approval status and the actions taken on your Expense Report.

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NEW FINANCIAL POLICY CHANGES OVERVIEW

✓ **Reimbursement Method**

Previous Policy	Previously, we used TBER forms to process reimbursements for ALL staff and students which were submitted in physical copies for processing.
Current Policy	Columbia University is now using Concur, a new platform for processing Travel and Business Expenses. TBER forms will no longer be accepted for reimbursement purposes. All staff must use Concur to submit Travel and Business Expenses for **all** reimbursements.

✓ **Reimbursement Method for Students/Guests**

Previous Policy	Students and Guests were allowed to file TBER forms/ check requests to process reimbursement with physical copies of the relevant receipts.
Current Policy	By default, Students and Guests (Outside Parties) do not have access to Concur. To assist Students and Guests with reimbursable expenses, a Staff member can create and complete a Travel and Business Expense Report on their behalf. This can be done by accessing the Non-Profiled Payee Travel and Business Expense Worksheet online and submitting on behalf of the student or guest through Concur.

✓ **Travel Arrangement Method**

Previous Policy	WEAI used Valerie Wilson Travel to assist with booking travel.
Current Policy*	Columbia University has contracted with **World Travel, Inc. (WTI)** to assist Columbia travelers in making ALL business travel arrangements, consistent with Columbia's travel policies, cost considerations, and preferences. Travelers are advised to contact a Columbia University designated Travel Counselor at World Travel, Inc. (WTI) at 1-855-961-0313 to book their international trip and ensure all requirements are met to travel internationally.

✓ **Direct Deposit/ACH Request Method for Employees and Students**

Previous Policy	All previous Direct Deposit/ACH Request Methods were done via the Vendor/Payee Request Web Form.
Current Policy	Employees and Students alike can view and update the method for how they receive Accounts Payable (AP) Reimbursements for travel and business expenses on www.my.columbia.edu. The AP Reimbursement method is related to your Direct Deposit settings for Payroll with one of the following defaults, which you can change as desired by selecting the "View Your AP Reimbursement Payment Method Information" tab.

✓ **Still have Questions?**

If you encounter any issues, please do not hesitate to reach out to Willson Nguyen at wn2194@columbia.edu for further assistance. You can also find additional information in our Financial Policy Presentation or on our WEAI Financial Policies and Procedures website.

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CONCUR TIPS AND SUGGESTIONS II

✓ Adding Receipts

Receipts must be added individually to the expense report for non-travel expenses of $50 or more. Each receipt/order is considered a separate expense and should not be combined. All proof of payment, such as a credit card statement or a bank statement, must be included as well.

✓ Adding A Missing Receipt Affidavit

When viewing the Expense list in your Expense Report, where one or more Expense items are missing receipts, click the Manage Receipts drop down menu and select Missing Receipt Declaration. Then, Select the checkboxes for the Expense Items missing receipts and click Accept & Create. The Receipt column displays the Missing Receipt Declaration icon.

✓ Deleting or Recalling an Unsubmitted Expense Report

If you have created an Expense Report that you want to delete, you can do so if it is not submitted into the approval workflow. First, click the Expense tab. Second, click the Expense Report with the status of Not Submitted that you want to delete. Click the Delete icon next to the Report Name. The Confirm Delete window appears.

✓ Deleting or Recalling a Submitted Expense Report

If you have submitted an Expense Report for approval, you can recall it at any point before it is fully approved for payment. After it is recalled, you can edit or delete it. First, click the Expense Report with the status of Submitted that you want to recall. Second, click the Recall Report button.

✓ What are "Available Expenses" in Concur?

The Available Expenses in Concur show receipts of expenses that may be eligible for reimbursement. To get this reimbursement, users must complete and submit an Expense Report.

✓ Searching for a Concur Transaction in ARC

You can search ARC for Vouchers associated with Concur transactions The Concur Report Key maps to the ARC Invoice ID. First, in Concur, click the Expense tab. The Report Library View displays Active Expense Reports. Second, click the View dropdown and select the desired view whereby the results will then appear. Third, click the row of the desired Expense Report to view and choose the Report Details dropdown and select Report Header. The Report Header screen appears where you will see the **Report Key**. Last, take this report key and search for it on ARC.

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CONCUR TIPS AND SUGGESTIONS III

✓ How To View Comments in Expense Reports as Approvers

On your CONCUR main page, navigate to the Approvals tab and select Reports. The list of Reports Pending your Approval will appear. Then, click the Expense Report you want to view for approval. The Expense Report appears with alerts indicating which Expense Items contain exceptions and if the item contains a comment. Mouse over the Comment icon to view the comment history. If the Expense is itemized, you may need to expand the Expense in order to view the relevant comment.

✓ How To Update My Admin Department In My Profile Or Expense Report

On your CONCUR main page, click Profile and Profile Settings on the top right of your screen. Then, click Request Information or the Expense Information link. The Request Information and Expense Information forms are exactly the same and updating can be accomplished in either place as the information is identical. After that, click the Admin Department dropdown to search and select the appropriate Admin Department. You can search by either Text or Code (level 8 Admin Department).

✓ How To Calculate My Personal Car Mileage Expense

On your CONCUR main page, navigate to Expense Report and click the Add Expense button. Select Personal Car Mileage under the Transportation category. The Mileage Calculator screen appears. Then, enter your trip Waypoints, including start and end points. Concur will automatically provide additional Waypoint fields so you can enter as many as required and mark any leg of the trip as Personal, if needed. You can also select options to avoid Tolls or Highways in your route. Select one of the Suggested routes and click Add Mileage to Expense. The Distance and Amount is entered into your Expense item. Please make sure you enter the Transaction date and click the Submit Expense button.

✓ How To Update My AP Reimbursement Using PAC Self-Service

First, go to my.columbia.edu and log in using your UNI and password. On the Faculty and Staff page under the Self-Service section, click View Your AP Reimbursement Payment Method Information. Second, Click the Payroll & Compensation tile. The Direct Deposit module within the Payroll & Compensation screen appears. Then, update with the AP Reimbursement tab.

✓ Still Have Questions?

If you encounter any issues, please do not hesitate to reach out to Willson Nguyen at wn2194@columbia.edu for further assistance. You can also find additional information in our Financial Policy Presentation or on our WEAI Financial Policies and Procedures website.