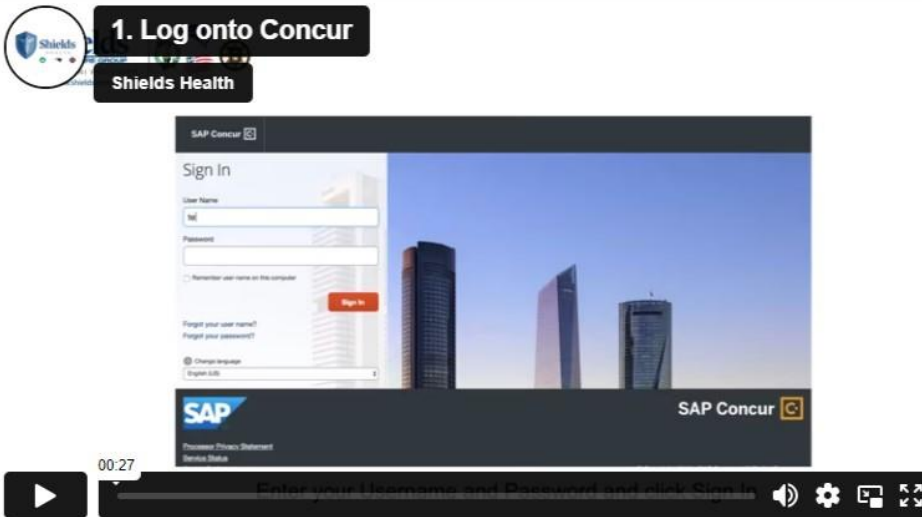


Concur Training Guide



Getting Started

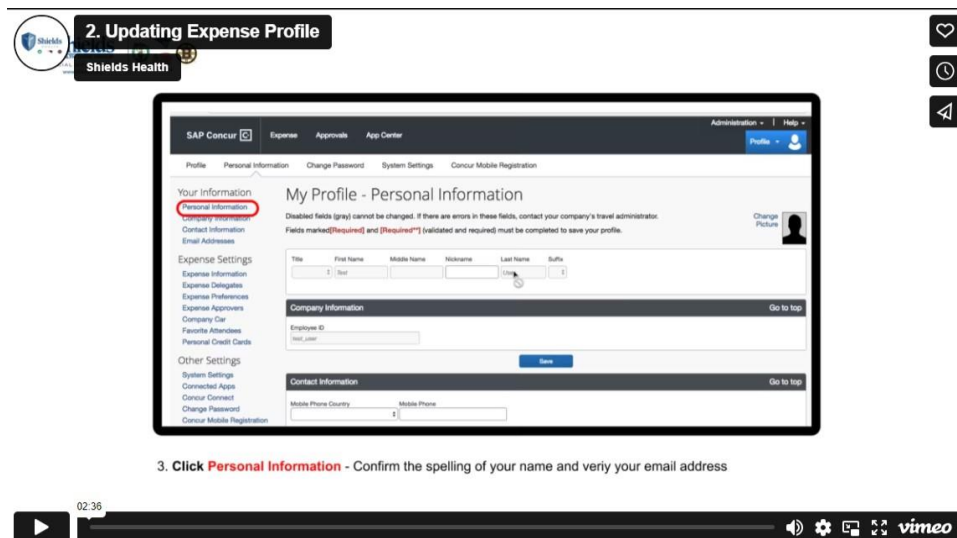
The first step in setting up your Concur account is to log in. You should have received an initial email from Concur which contains your username and password as well a link to Concur's sign in page. If you have misplaced this email or the link has expired, go [here](#). Then enter your login ID (Shields email address) and password (welcome1). You should be immediately prompted to reset your password once you have signed in for the first time. For visual instructions, please see the training video below. *NOTE: This page works best in Chrome. If you are using Internet Explorer, click this link for the video: <https://vimeo.com/332285354>*



Note: if you are experiencing technical issues signing in or resetting your password, please contact [Concur Support](#) via the email in the Shields Global Address List in Outlook.

Account Set Up

Upon logging in for the first time, it is necessary to customize and confirm your account settings to optimize Concur functions. From the SAP Concur home page, go to profile > profile settings and follow the steps outlined below and in this “Updating Expense Profile” video. *NOTE: This page works best in Chrome. If you are using Internet Explorer, click this link for the video: <https://vimeo.com/332287615/31dd1a699a>*



Under Your Information:

Go to > Personal Information

- Confirm the spelling of your first and last name
- Confirm your email address (should be your work email)
- Verify your email address (steps below)
 1. Under e-mail address click the “Verify” link
 2. Check your email for a verification message from Concur
 3. Copy the code from the email message in the “Enter Code” box next to the email address
 4. Click “OK” to submit the code and complete verification

Why verify your email address?

With your email address verified, you can forward receipt images to receipts@concur.com (also in Shields Global Address List in Outlook as Concur Receipts) and have them stored on your Concur account under available receipts.

Under Expense Settings:

- Expense Delegates- Add delegate(s) (if desired)
- Expense Preferences- Set email notification preferences
- Expense Approvers- Confirm this is your direct manager

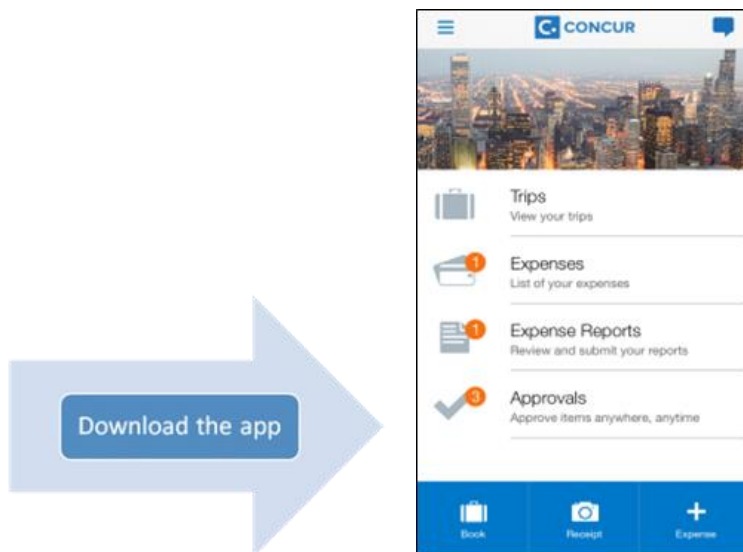
Concur Payments

If you would prefer to have reimbursement checks directly deposited into your bank account, please click below to download and fill out an EFT form then email to Accounts Payable. *If you do not submit an EFT form, reimbursement payments will be made via check mailed to your home address.*

Concur Reimbursement Form

Reimbursement cycles or check runs occur around the 1st and 15th of every month. If you are signed up for direct deposit, then your reimbursement checks will be deposited within 1-2 business days after a check run occurs. For employees without direct deposit, checks will be mailed to your home address and you will need to allow 7-10 business days to receive.

Concur Mobile Application



Concur's mobile app lets you manage your expenses—from taking a picture of your receipts, to submitting and approving expense reports—all from your smartphone.

What is Concur Mobile?

- An extension of the website
 - On-the-go travel and expense functionality
 - Business trip and expense management for a smartphone or tablet
 - Convenient access to speed up submissions and approvals
- Available for iPhone, Android, and Windows. Functionality varies by platform.*

Mobile Expense Functions

- Receipt Capture (image) and attach to an expense
- Mileage capture
- Create an expense report
- Add an expense
- Approve an expense report

For more detailed instructions on any of the mobile app functions please explore the mobile app instruction guide by clicking below:

2 – Concur – Mobile App

Note: Concur mobile app instructional guide can also be found [here](#).

Creating Expense Reports & Adding a New Expense

The screenshot shows the SAP Concur mobile app interface for creating a new expense report. The title is "3. Creating a New Report". The report is for July 2018, with a total amount of \$1,091.45. A red box highlights the "Submit Report" button in the "More Actions" menu. The interface includes a navigation bar with "Expense", "Approvals", and "App Center" tabs. Below the report details, there is a table of expenses:

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Cash	Capital - Fixed Asset Suspense Account	CDW	07/25/2018	\$1,084.36
<input type="checkbox"/>	Cash	Personal Car Mileage		07/25/2018	\$7.09
					\$1,091.45

NOTE: This page works best in Chrome. If you are using Internet Explorer, click this link for the video above: <https://vimeo.com/332287854/4a206ea402>

1. On the SAP Concur home page, click **Start a Report** on the Quick Task Bar.
2. On the **Create New Report** page, complete all required fields (indicated with a red asterisk) and the optional fields as directed by your company:
 - Report Name = month "Expenses" (e.g. July Expenses)
 - Report Date = Last Day of the month (e.g. 07/31/2018)
 - Business Purposes = same as Report Name (e.g. July Expenses)
 - Company Name, Company Code, Location, Modality and Department automatically defaults to your home company.

Create New Report x

* Indicates required field

Report Name * Report Date Business Purpose

Company Name * Company Code * Location *

Modality * Department *

Comment

3. Click **Create Report**.
4. Click **Add** to create a new expense.

July 2018 \$0.00 Delete Report Submit Report

Not Submitted

Report Details

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
No Expenses Add expenses to this report to submit for reimbursement.						

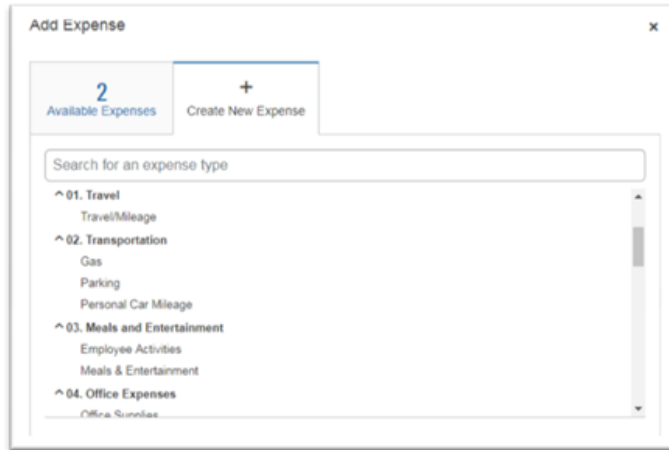
5. The **Add Expense** window will pop up.

Add Expense x

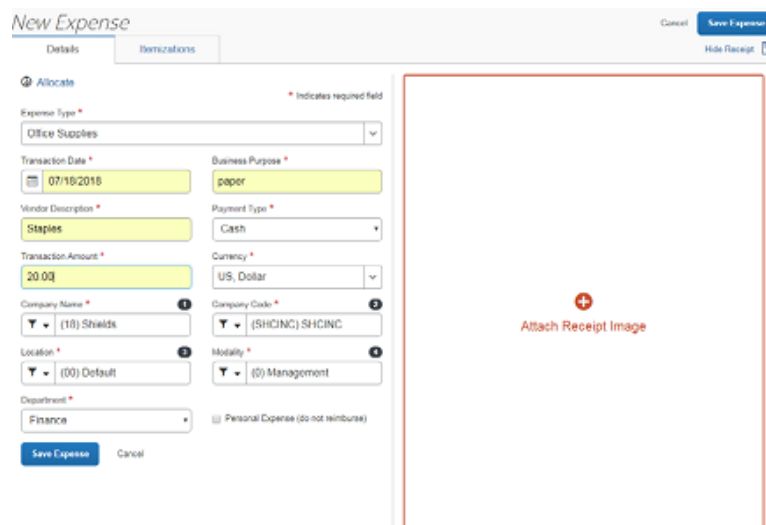
2 Available Expenses

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Cash	Meals & Entertainment	STOP & SHOP	07/23/2018	\$81.43
<input type="checkbox"/>	Cash	Meals & Entertainment	Washington ST	06/30/2018	\$139.19

- Select **Available Expenses**, and select the expenses you wish to add. **Note:** You will only have available expenses if you already uploaded pictures of your receipts using the Concur mobile app.
- Or select **Create New Expense** to create a new expense, and then select an expense type from the list that automatically populates.



6. Complete all required fields and the optional fields as direct by your company. **Note:** *Company Name, Company Code, Location, Modality and Department will automatically default to your home company. If the expense should be reimbursed by a different company, location or modality, please make the appropriate changes.*



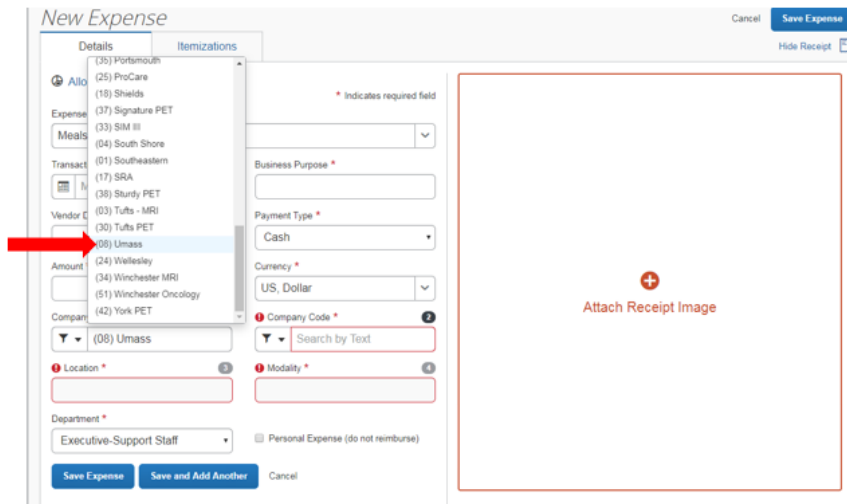
7. Select **Attach Receipt Image** to attach your receipt. From the **Attach Receipt** window, click **Browse** to locate the image file, or select available receipts, and then click **Attach**.
8. Click **Save Expense**. Done! Repeat steps 4-8 until you've added all the expenses you'd like reimbursed in this report.

Coding an Expense

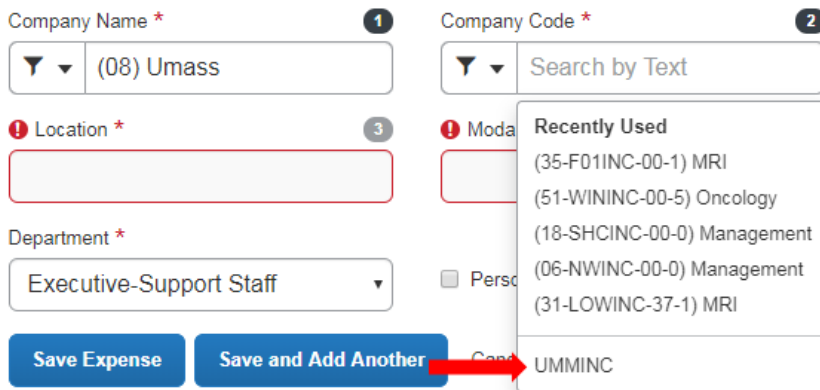
On a normal expense the Company Name, Company Code, Location and Modality will automatically be coded for you according to your home base in Concur. If the expense should be reimbursed by a different location that is not your home base please follow instructions for coding an expense.

Note: The “recently used” section that will appear in the drop down list may not be the recommended code for that particular center.

In this example, I will be coding an expense to UMass University.



Next, I will choose the company code. There will be only one company code associate with each center. Therefore I must use UMMINC for the company code.



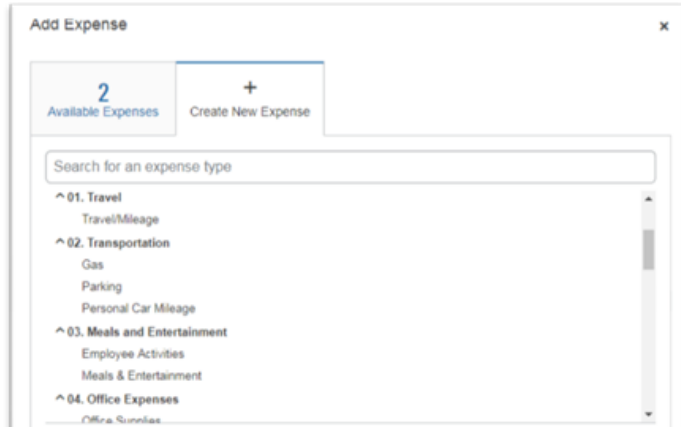
For location I have selected select the University Campus at UMass so it will be budgeted to that site. Depending on the JV partner some centers will have multiple locations. UMass has five different centers to choose from.

Finally, I will need to choose the correct modality. Since we only perform MRI's at University I will click on (1) MRI. If I am requesting reimbursement from a PET site, then my modality would be (1) PET.

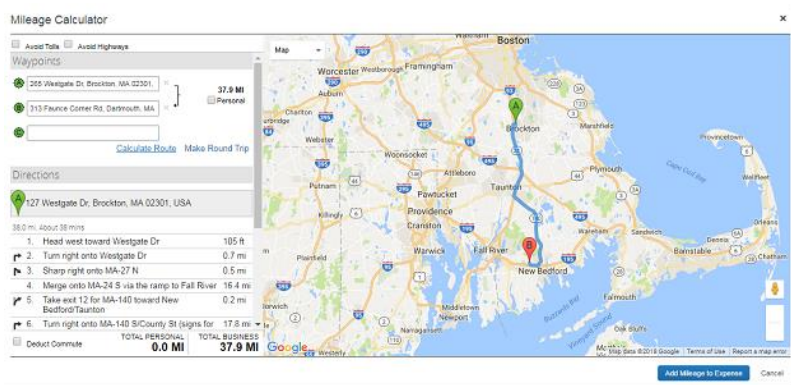
Adding Mileage to an Expense Report

1. Create a new Expense Report (follow the steps under **Creating Expense Report** above) or open an Expense Report under **Open Reports**.

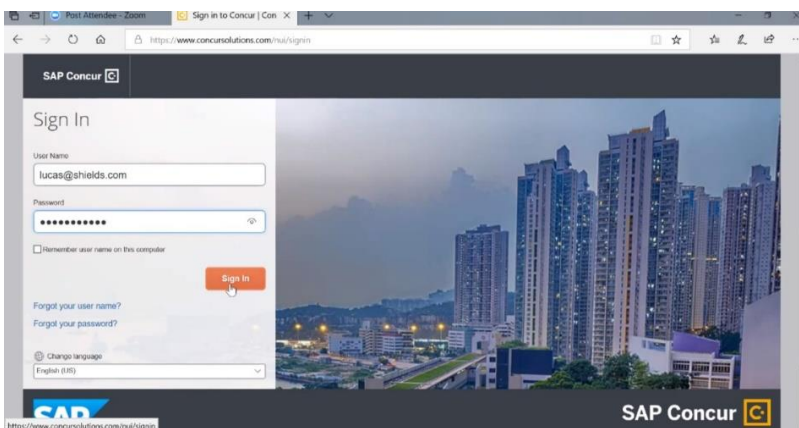
2. Click **Add > Create New Expense**, and select **Personal Car Mileage** under expense type.



3. On the **Mileage Calculator** screen, enter the **from** and **to** locations.
4. To **edit** the route Concur has selected, click and drag the blue line until it accurately reflects your drive.
5. Click **Calculate Route**, and then click **Add Mileage to Expense**.



6. Enter the **Transaction Date** and **Business Purpose**, and then click **Save Expense**.
- Note:** for additional help creating a mileage expense, watch this training video:
<https://vimeo.com/927963000/8b840f3ee7?share=copy>



Note: For questions on what miles can be submitted for reimbursement, please review Shields Health Care Mileage policy attached here.

Other Training Videos, Links, and Materials

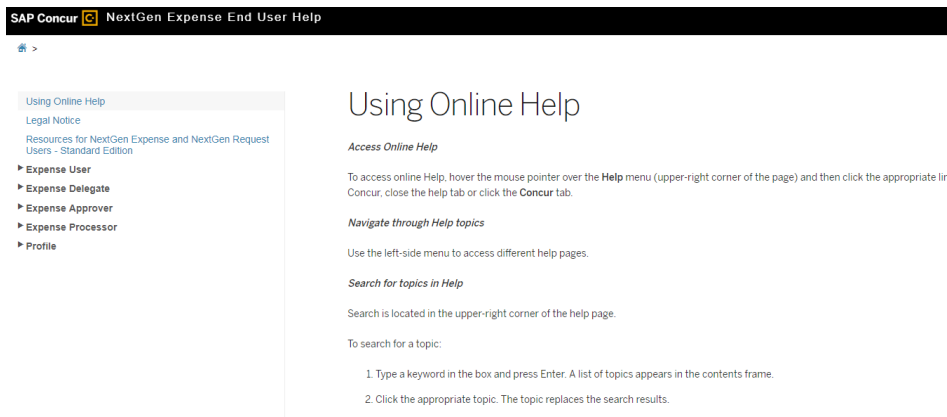
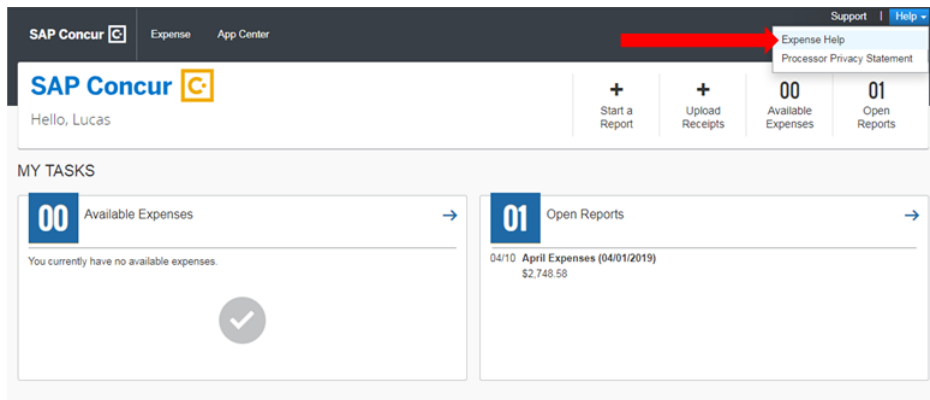
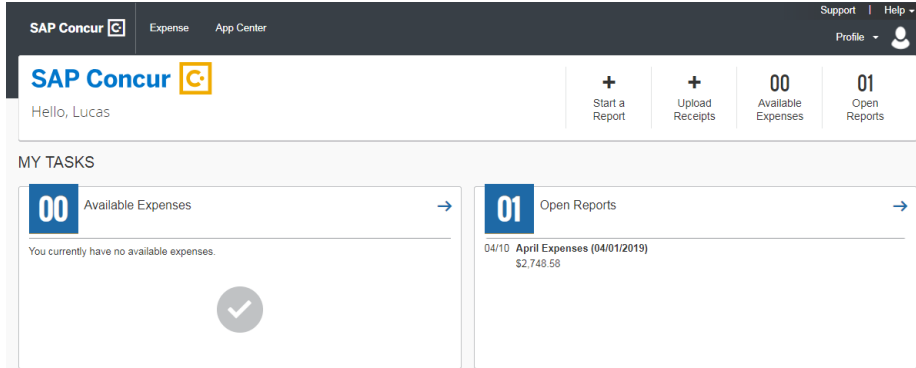
You can access additional training guides and demonstrations by clicking here.

Concur Web Version Guide:

1 – Concur – Web Version

Concur- Expense Help:

To access alternative training guides made by Concur, go to the Concur home page, click on **Help**, then **Expense Help**; or, see visual instructions below:



Commonly Asked Questions

If I'm a manager, how often should I be approving expense reports?

Managers are required to approve expense reports no later than two weeks after a report has been submitted for approval.

How long does it take to be reimbursed once an expense report has been submitted?

Expense reports will need to be approved by your manager first. Then reimbursement cycles or check runs occur on the 1st and 15th of every month. If you are signed up for direct deposit then your reimbursement checks will be deposited 1-2 business days after a check run occurs. For employees with out direct deposit, checks will be mailed to your home address and you will need to allow 5-7 business days for shipping.

What if I'm being reimbursed less for mileage on Concur?

Concur automatically selects the fastest route from point A to point B based on google maps. If you have taken a different route you may alter this by dragging the blue line to personalize your route when adding mileage to an expense report. (See instructions on adding personal car mileage)

What if I'm having trouble signing in to Concur for the first time?

Please try resetting your password by contacting ConcurSupport@shields.com

Do I need to complete the EFT form?

No, accounts payable will cut checks if you have not submitted your EFT form. However, if you would like to have reimbursement directly deposited into your bank account, you must fill out the EFT form and submit to Accounts Payable.

What is considered personal car mileage?

To view details on mileage reimbursement, visit page 44 of the Employee Handbook on the Shelds InfoHub page.

What if the hyperlinks are not loading properly?

If you experience any difficulties with the posted links, try copying and pasting the URL to Google Chrome or another web browser.