

## CONCUR QUICK GUIDE

STEPS	ADDITIONAL INFORMATION
<b>1: Request Expense Account</b>	Email <a href="mailto:ug-finance@wharton.upenn.edu">ug-finance@wharton.upenn.edu</a> to be added to the system. Include your full name and Penn ID in the email request.
<b>2: Launch Concur</b>	Log into Concur from the <a href="#">Penn TEM website</a>
<b>3: Update Account Details</b>	Under profile settings, update the Personal Information and Banking Information sections
<b>4: Create Report</b>	Click <b>Start a Report</b>
<b>5: Fill out Report Header</b>	<ul style="list-style-type: none"> <li>• Type of Report – <b>New Expense Report</b></li> <li>• Report Name should clearly reflect the expenses placed on this specific report, e.g., Name of Conference Nov 2025</li> <li>• Type of Travel – Select #1-4</li> <li>• Business Purpose type</li> <li>• Report Date</li> <li>• Trip Date (if applicable)</li> <li>• Business Justification – Explain the business purpose of the expense</li> <li>• Remaining fields represent the funding source. Please make sure they reflect <a href="#">(070-0733-1-000000)</a>. They can be changed by typing in the account code slowly until it appears in the drop-down list to click on.</li> <li>• School/Center can remain (07) WH</li> <li>• Program and CREF can both remain (0000)</li> </ul>
<b>6: Enter Expenses</b>	<ul style="list-style-type: none"> <li>• Select Add Expense (Students should select Student Activities for most expenses, and for web hosting/email services, select Subscriptions.)</li> <li>• Provide the details of the expense for all fields that have an asterisk</li> </ul>
<b>7: Attach receipts and additional backup</b>	<ul style="list-style-type: none"> <li>• Please upload an itemized receipt, proof of purchase and proof of event</li> </ul>
<b>8: Submit Report</b>	<ul style="list-style-type: none"> <li>• Report will be electronically sent to your approvers</li> <li>• If an approver rejects it, the report is electronically returned to the individual's account in Concur and notification is sent to their email. Log into <b>Concur, Home, Expense</b>, find the specific expense report, and read the <b>explanation</b> for rejection. <b>Fix</b> the report and <b>resubmit</b></li> <li>• You may see the status of your report in the <b>Report Library</b></li> <li>• Once approved by all approvers in the workflow, the reimbursement will be sent directly to your bank account</li> </ul>