

CONCUR STEP BY STEP

STEPS	ADDITIONAL INFORMATION
1. Request Expense Account	Email ug-finance@wharton.upenn.edu to be added to the system. Include your full name and Penn ID in the email request.
2. Launch Concur	Log into Concur from the Penn TEM website or from the Concur link on the U@Penn portal.
3. Update Account Details	Under profile settings, update the Personal Information and Banking Information sections
4. Click New Expense Report	Found under Expense Tab
5. Fill out Report Header	<ul style="list-style-type: none">• Required fields are marked by a red asterisk.• If you select International in the first box, select the country in the second box.• Report Name should clearly reflect the expenses placed on this specific report-example: Finance Club Conference May 2024• Remaining fields represent the funding source. Please make sure they reflect (070-0733-1-000000). They can be changed by typing in the account code slowly until it appears in the drop-down list to click on.• School/Center can remain (07) WH.• Program and CREF can both remain (0000).
6. Enter Expenses	<ul style="list-style-type: none">• Click New Expense. Select Student Activities for most expenses. For web hosting/email services select Subscriptions.• Provide the details of the expense for all fields that have an asterisk
7. Attach receipts and additional backup	<ul style="list-style-type: none">• Please upload an itemized receipt, proof of purchase and proof of event
8. Submit Report	<ul style="list-style-type: none">• Report will go through a defined list of approvers.• If an approver rejects the report, it will be returned to you in Concur and a notification will be sent to your email. In Concur, select View Reports, find the specific expense report, read the explanation for rejection, fix the report, and resubmit.• Once approved by all approvers in the workflow, the reimbursement will be sent directly to your bank account.