Concur Guidance

for the Department of Mathematics

Concur is the expense reimbursement platform for all Columbia University employees. This system provides a number of features to simplify the reimbursement process:
- All receipts and expense reports can be submitted online
- Report status and history can be monitored
- Travel can be arranged directly within Concur Travel.
  - Advantages to booking travel through Concur include: compliance with University policies, automatic travel registration with ISOS, and direct billing to projects (no need to pay out of pocket)

Getting Started

In order to submit expenses, complete the following steps to establish your Concur profile:
1. Assign a Preparer Delegate **[required]**
2. Set personal information and a default account [optional]

1. Assign a Preparer Delegate

1. Log in to Concur, click on "Profile"
2. Click "Profile Settings"
3. Click "Expense Delegates" from the left menu
4. Select "Add"
5. In the box that appears, enter **Zubaida Pinky (zp2253)**, then click "Add".
6. Select the following options: "Can Prepare", "Can Submit Reports", "Can View Receipts"
7. Click "Save"
8. Repeat steps 3-7 to add **Deniz Macleod (dm3111)** as an additional delegate.

   [See figure 1 on the following page]

Optional step: add Nathan Schweer (ns2750) an emergency backup delegate.

Note: Do not select "Can Book Travel". The department will not have the ability to book individual travel; this responsibility remains with the traveler.

The Preparer Delegate role allows a staff member to prepare expense reports on behalf of a faculty member. **Personal profile data is NOT visible** to delegates. A Preparer Delegate also cannot submit a report directly for approval. After a request is prepared, an email notification will be sent to the faculty

member to review and approve the report in Concur. The faculty's "digital signature" certifies that the expenses entered by the delegate are appropriate and correct.
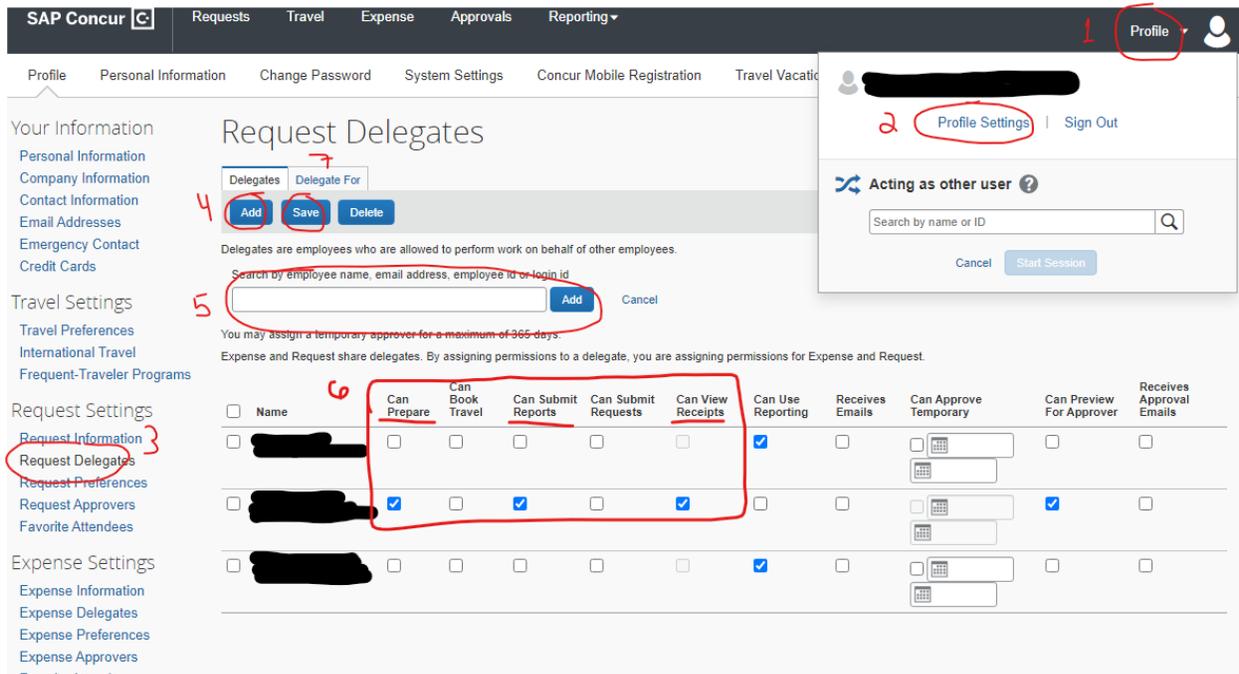
Figure 1 - Assign a Preparer Delegate

2. Personal Information and Default Account

Log in to Concur, click on "Profile", "Profile Settings, then "Personal Information" from the left menu. Required fields will be indicated in red.

Faculty who have a primary source of funding may set a default account. Within Profile Settings, click on "Request Information" to access the account details section. Fields for School/Division/Sub-Division/Admin Department/GL BU/Department will default to A&S and Mathematics. PC Business Unit will be either SPONS (for sponsored projects) or GENRL (for non-sponsored accounts). Project/Activity/Initiative/Segment will vary depending on the funding source. See figure 2 on the following page.

For assistance setting a default account please email the department *after* completing step 1 with the account you would like to set as default (NSF grant, startup account, etc.). Faculty whose primary funding is FRAP should enter the account information provided separately by Arts & Sciences. Accounting information can be changed later for individual expenses or entire expense reports if needed.

How to Submit an Expense Report

Option A – Use Concur **(RECOMMENDED)**

Faculty may wish to enter expense reports directly in Concur to streamline the process. To submit an expense report:

1. See the detailed instructions to create an expense report:
   https://www.finance.columbia.edu/content/creating-expense-reports-concur
2. When the report is complete, email reimbursements@math.columbia.edu *prior to submitting the report* to request an initial review
3. Address any updates identified during the initial review
4. When the report is ready, click the "Submit Report" button, then "Accept and Continue"

Option B – Use a Preparer Delegate

Email a list of itemized receipts with proof of payment to reimbursements@math.columbia. Include a statement and document to confirm the business purpose. A Preparer Delegate will compile the expense report in Concur and send a notification when it is ready for review and approval. Faculty can then log in to Concur to review and approve the report.

Links and Additional Guidance

Concur Website:
https://travel-expense.finance.columbia.edu/

Concur training articles:
https://www.finance.columbia.edu/training-library#/service-images/term/495

90 minute Concur Overview Webinar (from 9/15/20):
https://columbiauniversity.zoom.us/rec/share/N8j3FpKc2hpx27bFrdYW2C41fCVJ48wiDRB-LE0DqLec4h3z1F2UVKwUqGIYXOi6.STzsC1qgZgPhIyo9?startTime=1600193034000

Setting up your Concur profile for travel and expense users**:**
https://www.finance.columbia.edu/content/setting-your-concur-profile-travel-and-expense-users

Step by step instructions on how to assign and manage delegates:
https://www.finance.columbia.edu/content/managing-delegates

Creating Expense Reports in Concur Job Aid:
https://www.finance.columbia.edu/content/creating-expense-reports-concur

2-minute video walkthrough for creating a travel expense report**:**
https://www.finance.columbia.edu/content/creating-and-submitting-travel-expense-report