

Concur

Enter a Bank

Click on Profile Settings under Profile

Enter Bank Routing # and Bank Account

Under Active, select yes

Select Save and Agree

Creating a New Expense Claim

Hover over new;

Click Start a Report

If filing receipts for a credit card, input **WF-D<56><YourName><Month><Year>**

If filing receipts for out of pocket, input **OOP-D<56><YourName><Month><Year>**

So that the expense claims read: OOP-D56-KKest-June-2019

Click Next

If completing a district credit card transaction, your expenses will automatically appear under available expenses. Select appropriate expense type.

To attach a receipt, click on attach receipt. Browse to get your receipt. Click attach>Review receipt

Click Save

Click submit report

Expense reports can be approved or returned

To correct an expense report>Click on the open Report

Review approver's comments and make the necessary changes or add comments. Click Save>Submit Report

Click Final Review>Accept & Submit

To approve Click Required Approvals.

Select the desired reports. Review Expenses. Click approve or return