

## 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