Quick Guide for Student Reimbursement SAP Concur C

1. Before you log your first student reimbursement claim, please log into Student Services Online -> Personal Bank Account and enter your bank account.

Please note, the system will automatically grant you access within **two** *business days, subject to that your bank account is entered by 6 p.m.*

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Account Holder's Name	*Bank *Branch	*Account	*Suffix		
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- 2. Log into Concur via one of the channels below:
 - UoA home page->students->My tools
 - Copy this link <u>http://www.concursolutions.auckland.ac.nz/</u> and paste to your browsers

Version 3

26/10/2021

o Search 'Concur' in the search bar of University Website Home Page

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• Click dropdown menu from 'Quick Link' (if you are also an employee)

Welcome to the Staff Intranet	1000	enter keywords Sea	Staff Service Centre ?
STAFF INTRANET HOME	University home » Staff Intranet Home »	Teaching and students » Services for students » Student Services Online » Student Services Online access	Find University people

3. Click 'Start a Report'

SAP Concur 🖸 Expense App Center				Help+ Profile + 💄
SAP Concur C Hello, Tingxuan	+ Start a Report	+ Upload Receipts	00 Available Expenses	03 Open Reports

- 4. Complete mandatory fields & click create Report
 - Report name
 - Department (to enter cost centre code here)
 - Project (if charging to PReSS account, then enter your Upi; If no project applicable, click & select 'No project')
 - Project Activity (click & select 'No project Activity')
 - Source Type (click & select 'No Source Type')

reate New Report					
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*Students The University of Auckland Expense Policy		Student Reinbursement		TEST	
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5. Click 'Add Expense'

Manage Expenses	
TEST NZD 0.00 面 Not Submitted	Submit Report
Report Details 🗸 Print/Share 🗸 Manage Receipts 🗸	
Add Expense Edit Delete Copy Combine Expenses Move to V	
No Expenses Add expenses to this report to submit for reimbursement.	

6. Select Expense Type from the dropdown menu



Version 3

7. Complete mandatory fields & attach your receipts, supervisor's approval and other supporting documents (You need to combine them into ONE pdf.)

Note: System will calculate GST automatically if your transaction is GST applicable.

Student Fie	ld Trips NZD 8	35.35 💼				Cancel	Save Expense
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Version 3

26/10/2021

Special note for charging to a PReSS Account

- You must select PReSS related expense type
- Click PReSS Department field to select the cost centre code based on your Faculty
- Department needs to be the same as 'PReSS department'
- PReSS G/L cdoe: click dropdown to select the right option matching the Expense type

⊖ → PF 27/2021	ReSS - Cons	um	able Supply&Servic	e NZC) 85.35 💼	Cancel Save Expen
Details	Itemizations					Hide Receipt
pense Type *			· ;	Required field		± ē :
PReSS - Consur	nable Supply&Service	es -		×)		
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leSS Department *		0	PReSS G/L Code * 🕜	0		
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Red flags – if you come across a red flag, this is hard constraint. This means, you can't submit your report unless the issues in the report are resolved. The red flag message will provide the information of what the issue is and how to resolve it.



Yellow flag – this is just a warning message. You can still submit your report but make sure you read and understand what the message is before submission.



- 8. After completing the expense details, then click 'Save Expense'
- 9. Once all expenses lines are created, click 'Submit Report'.

EST NZD 170.70 m Copy Report Submit Report					
Not Submitted					
Report Details 🗸 Print/Share 🖌 Manage Receipts	~				
Add Expense Edit Delete					
Alerts Receipt Payment Type	Expense Type	Vendor Details	Date 😇	Requested	
Cash	Student Field Trips	Auckland, Auckland	05/27/2021	NZD 85.35	
Cash	PReSS - Consumable Supply&Service	Auckland, Auckland	05/27/2021	NZD 85.35	
				NZD 170.70	

10. Read 'User Agreement' and Click 'Accept & Continue'

User Electronic Agreement for Student Reimbursement					
By clicking on the 'Accept & Continue' button, I certify that:					
 This is a true and accurate accounting of expenses incurred to accomplish official study related and there are no expenses claimed as reimbursable which relate to personal or unallowed expenses. 					
2. All required receipt images, supervisor's approval and a copy of your PReSS account balance (if applicable) have be attached to this report.	een				
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.					
4. In the event of over payment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.	I				
Cancel Accept & Continu	ie				

26/10/2021

11. Review the claim summary again and click 'Submit Report'





12. Back to Homepage of Concur, you can tell the report status at the bottom of each 'box'.

Manage Expenses

Manage Expenses	e R
€ Create New Report	
SUBMITTED 07/20/2021	
TEST	
NZD170.70	
Pending Cost Object Approval	

13. To find out who is the approver:

Double-click the report you want to check -> Click Report Details-> Click Report Timeline

Pending Cost O	bje	ct Approval	
Report Details 🗸	F	Print/Share 🗸	Manage Receipts 🗸
Report	ot	Payment Type	Expense Type
Report Header			
Report Totals		Cash	PReSS - Consumable Supply&Servic
Report Timeline			
Audit Trail			

Report Timeline

Copy: TEST | NZD85.35

Approval Flow

Budget Holder Approval

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PRESS , TLD , 3859662 Flint A (UOA-9444-A StudentApprover21, Approver

Report Summary

SUBMITTED Yang, Tingxuan 07/20/2021

PENDING COST OBJECT APPROVAL Yang, Tingxuan 07/20/2021