

1. **Go to Concur:** <https://www.concursolutions.com>
2. **Login to your profile**
 - a. Username: YE 1st 4 letters of 1st name 1st 4 letters of last name@kochind.com
 - i. Example: YEJohnSmit@kochind.com
 - b. Password: Default temporary password is Ye#1Teacher
 - i. Once you have set your permanent password that will carry over.
3. **Click on “Expense”**



4. **Click on “New Expense Report”**



5. **Fill in Report name, Business Purpose, and Comment if necessary. (Business Purpose will prepopulate in all of your expenses for this report)**
 - a. Example: Report Name – Room Supplies
 - b. Example: Business Purpose –Paper Airplanes (Business purpose needs to be more specific than the report name. This should also be individualized for each expense)

Create a New Expense Report

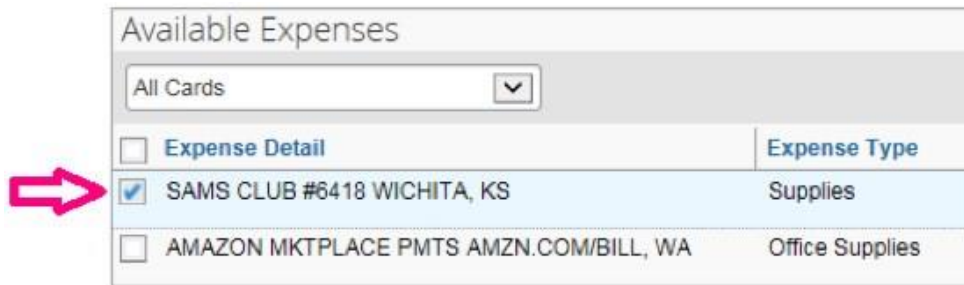
Report Header

Policy Fdns-YE T&E Policy	Report Name Room Supplies	Report Date 03/22/2018	Business Purpose Room Supplies-Paper Airplanes	Ledger Financial Edge
Company Code (1) YE	Additional Data 1 (550030) NATL-ALL-ADMIN			

6. Click "Next" (bottom right hand corner)



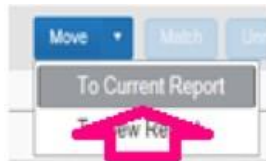
7. Check the box next to the expense that you want to reconcile



8. Click the drop-down arrow to the right of "Move"



9. Click "To Current Report"



10. Go to the left hand column, Expenses and mark ONE expense box that you want to reconcile first



11. Fill in the boxes

- a. Expense Type: Example: Supplies; Business Meals; Awards/Incentives
- b. Expense Sub Type: **IF APPLICABLE**, select teachers Only (*Hint Teachers Only will always be your sub type).
- c. Business Purpose: More Detailed Information: Example: Supplies for Paper Airplanes
- d. You can add a comment if you want to add more detail

The image shows a form titled "Expense" with several fields. Pink arrows point to the "Expense Type" dropdown (set to "Supplies"), the "Expense Sub Type" dropdown (set to "Teachers Only"), and the "Business Purpose" text field (containing "Room Supplies-Paper Airplanes"). Other fields include "Transaction Date" (03/16/2018), "Merchant" (SAMS CLUB #6418), "Payment Type" (913 USD CITI MC USA YEK), "Amount" (6.78 USD), and a "Comment" field.

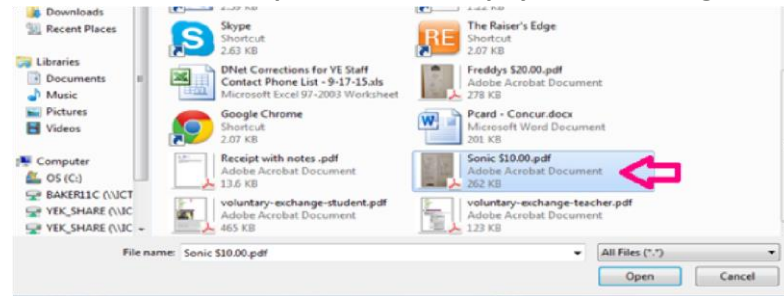
12. Click "Attach Receipt" – Save the receipts somewhere on your computer (desk top, in your documents)



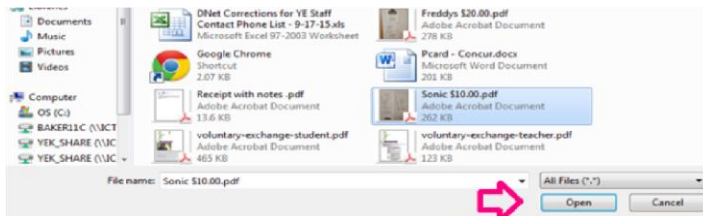
13. Click on "Browse"



14. Select the file path for the receipt you are needing to attach



15. Click "Open" at the bottom right-hand side



16. Click on "Attach"

Attach Receipt

Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.
No Receipt? Create a missing Receipt Affidavit here.

File Selected for uploading: Sonic \$10.00.pdf

Browse... Attach

17. Click "Save" in the bottom right-hand corner

Save Itemize Allocate Attach Receipt Cancel

18. Click on "Allocate" in the bottom right-hand corner

Save Itemize Allocate Attach Receipt Cancel

19. Fill in the boxes by clicking on them:

- a. Cost Center: Keep your default cost center that automatically generates.
- b. Project: Teacher Purchases (for any expenses that will be taken from your class budget); Classroom Volunteer; Teacher Opportunity Funds; Classroom Trips/Market Day; P-Teacher Training/Retreat etc

Allocations Total: \$78.19 Allocated: \$78.19 (100%) Remaining: \$0.00 (0%)

Allocate By: | Add New Allocation Delete Selected Allocations Favorites + Add to Favorites

<input checked="" type="checkbox"/>	Percentage	Company Code	* Cost Center	* Project	Code
<input checked="" type="checkbox"/>	100	(1) YE	-ALL-ADMIN	(7000) GENE...	-1--550030-7000

20. Click on "Save" at the bottom right-hand corner

Save Cancel

21. Click on "OK" on the pop-up box

Success

Allocations have been saved.

OK

22. Click on "Done" at the bottom right-hand corner



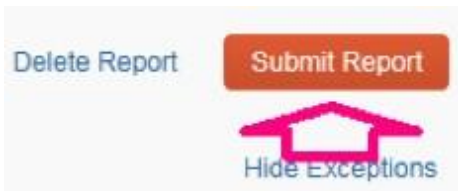
23. If you have additional expenses that need to be added, click on "Import Expenses"



24. Click on the next expense you need to reconcile and repeat steps 10 – 22.



25. If you are done you click "Submit Report" in the top right corner.



26. Click "Accept and Submit."

