

Purchase Settlement

Begin by logging into “MyNMU” at mynmu.nmu.edu. You will need to have your 2-factor Authentication set up to proceed any further.

Enter your User ID and Password



**NORTHERN MICHIGAN
UNIVERSITY**

User ID:

Password:

**NMU Educational Access Network
Single Sign On Service**

AUTHENTICATION REQUIRED
The web site described below has asked you to log in:

MyNMU

By using this service you agree to adhere to the [NMU computing policies and guidelines](#).

Please type your NMU "e-mail" User ID and password and click the "Login" button to continue.

To logout securely and completely, you must close your browser window when you are done.

[Forgot my password](#)
[Need help? Contact the Help Desk!](#)
[New to NMU? Activate your account](#)

Once logged in, Click on the “Employee Services” tab

The screenshot shows the MyNMU homepage. At the top, there is a green header with the MyNMU logo and the tagline "A link to your NMU information". On the right side of the header, the name "cspecker" and a "Logout" link are visible. Below the header is a navigation bar with three tabs: "Home", "Employee Services", and "Student Services". A red arrow points to the "Employee Services" tab. The main content area is divided into several sections: a "Welcome" message, an "Account Management" section with a "Manage Your User Account" link, a "Contact Information" section listing various departments and their contact details, and an "EduCat" section with the NMU EduCat logo. At the bottom of the page, there is a green banner with the Northern Michigan University logo and name, followed by a disclaimer and the text "Powered by Drupal".

Once in the “Employee Services” tab you will find the link to “Concur Settlement System”. Click on this link, it will bring you directly into the system. You will **not** need another password to access the system.

The screenshot shows the MyNMU Employee Services page. The header is identical to the previous screenshot. The navigation bar has "Employee Services" selected. The main content area is divided into several columns of service links. A red box highlights the "Concur Settlement System" link in the first column. The "Concur Settlement System" link is labeled "Click here to:" and "Submit a settlement report for travel or office purchases." Other links in the first column include "Web For Employees", "eBill Payment System", and "International Travel Registration". The second column contains links for "Police Department Services", "Qualtrics", "Retirement Plan Information", "Safety Department Services", "Scholarly Works Resource Site", "Starfish", and "UltraTime". The third column contains links for "Administrative Reports" and "Additional Employee Resources". The "Additional Employee Resources" section lists several links, including "A/P Career Path Workbook", "Employee Satisfaction Survey Results", "Policies, Procedures, Guidelines, Ordinances, Handbooks, Bylaws and Union Contracts", "Holiday/Seasonal Bonus Day Schedules", "ASNMU Dozing Discounts", "Handshake", "Mental Health Resources", "TAO Connect", and "Wildcat Express/Dining Services". At the bottom of the page, there is a green banner with the Northern Michigan University logo and name, followed by a disclaimer and the text "Powered by Drupal".

This is the first “Concur screen, from here the next step is to:

SAP Concur Administration | Help

Requests Expense Invoice Approvals App Center Profile

Hello, Courtney

+ New 00 Required Approvals 00 Invoices 01 Available Expenses 00 Open Reports

MY TASKS

00 Required Approvals → Great! You currently have no approvals.

01 Available Expenses → 09/11 USPS PO 2558400538 \$25.50

00 Open Reports → You currently have no open reports.

Click on “New” and then “Start a Report” for your available expenses

Once you click on “Start a Report”, the next screen you will see is the following:

Create New Report

* Indicates required field

Policy * Travel and Entertainment

Report Date 09/26/2019

Business Purpose *

Comment

Travel Type *

Departure Date * MM/DD/YYYY

Organization Number Controller (271102)

Report Name *

Return Date * MM/DD/YYYY

You will need to select what policy you will be working under by clicking the “down arrow”

Cancel Create Report

*****For this example we will be working with the PURCHASING policy*****

Create New Report



* Indicates required field

Policy *

Report Name *

Report Date

Business Purpose *

Organization Number

Travel Type *

Comment

Fill in the required "Report Name" and "Business Purpose". Then click on "Create Report"

Cancel

For the next step you will need to click on "Add Expense", you will then come to this screen:

SAP Concur

Add Expense

1 Available Expenses

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Travel Card	Undefined	USPS PO 2558400538 Marquette, Michigan	09/11/2019	\$25.50

Select the "Expense" that belong to the report, then select "Add to Report"

SAP Concur

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Service Status (North America)
Cookie Preferences

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SAP Concur | Requests | **Expense** | Invoice | Approvals | App Center | Administration | Help | Profile |

Manage Expenses | View Transactions | Process Reports

Alerts: 1

TV/FM Payment \$25.50
Not Submitted

More Actions | Submit Report

Report Details | Print | Manage Receipts

Add Expense | Edit | Delete | Copy | Allocate | Combine Expenses | Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
		Travel Card	Undefined	USPS PO 2558400538 Marquette, Michigan	09/11/2019	\$25.50
						\$25.50

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If you have errors, you will fix them by clicking on the “Exclamation Point”, then click on “View.”

SAP Concur | Requests | **Expense** | Invoice | Approvals | App Center | Administration | Help | Profile |

Manage Expenses | View Transactions | Process Reports

Alerts: 1

TV/FM Payment \$25.50
Not Submitted

More Actions | Submit Report

Report Details | Print | Manage Receipts

Add Expense | Edit | Delete | Copy | Allocate | Combine Expenses | Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
		Travel Card	Undefined	USPS PO 2558400538 Marquette, Michigan	09/11/2019	\$25.50
						\$25.50

Alerts [X]

The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report. [View](#)

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This example, I have an “Undefined” expense type.

The screenshot shows the SAP Concur Expense form interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Expense', 'Invoice', 'Approvals', and 'App Center'. Below this, there are sub-tabs for 'Manage Expenses', 'View Transactions', and 'Process Reports'. A red alert banner at the top states: 'Alerts: 1' and 'The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.' The main form title is 'Undefined \$25.50' with 'Cancel' and 'Save Expense' buttons. Below the title, there are fields for 'Transaction Date' (09/11/2019), 'Business Purpose' (TV/FM Payment), 'Vendor Name' (USPS PO 2558400538), 'City' (Marquette, Michigan), 'Payment Type' (Travel Card), 'Amount' (25.50), and 'Currency' (US, Dollar). There is also a checkbox for 'Personal Expense (do not reimburse)' and a 'Comment' field. A red oval highlights the 'Expense Type' dropdown menu, which currently shows 'Undefined'. A red arrow points from this oval to a text box that says 'Select the proper “Expense Type” from the drop down menu, then click on “Save Expense”'. Another red arrow points from the 'Save Expense' button to the same text box. To the right of the form, there is a large area with a red border and a plus sign icon, labeled 'Attach Receipt Image'.

Alerts: 1

The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.

Undefined \$25.50

09/11/2019 | USPS PO 2558400538 | Corporate Card

Details Itemizations

Expense Type * Undefined

Transaction Date 09/11/2019 Business Purpose TV/FM Payment

Vendor Name USPS PO 2558400538 City Marquette, Michigan

Payment Type Travel Card

Amount 25.50 Currency US, Dollar

Personal Expense (do not reimburse)

Comment

Save Expense Cancel

Attach Receipt Image

Select the proper “Expense Type” from the drop down menu, then click on “Save Expense”

SAP Concur  Requests **Expense** Invoice Approvals App Center Administration | Help

Profile 

Manage Expenses View Transactions Process Reports

TV/FM Payment \$25.50 More Actions Submit Report

Not Submitted

Report Details Print Manage Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Travel Card	7191 Postage and shipping	USPS PO 2558400538 Marquette, Michigan	09/11/2019	\$25.50
						\$25.50

 **SAP Concur** 

[Processor Privacy Statement](#)
[Service Status \(North America\)](#)
[Cookie Preferences](#)

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You will need to attach receipts for each of your transactions. To do so, you will click on each separate expense.

Manage Expenses

View Transactions

Process Reports

← → 7191 Postage and shipping \$25.50

Cancel

Save Expense

09/11/2019 | USPS PO 2558400538 | Corporate Card

Details

Hide Receipt 

 Allocate

* Indicates required field

Expense Type *

7191 Postage and shipping

Transaction Date

09/11/2019

Business Purpose *

TV/FM Payment

Vendor Name

USPS PO 2558400538

City

 Marquette, Michigan

Payment Type

Travel Card

Amount

25.50

Currency

US, Dollar

Personal Expense (do not reimburse)

Comment



Attach Receipt Image

Click here, select the file that you saved your receipt image as.

7191 Postage and shipping \$25.50

09/11/2019 | USPS PO 2558400538 | Corporate Card

Cancel **Save Expense**

Details

Hide Receipt

Allocate

* Indicates required field

Expense Type *

7191 Postage and shipping

Transaction Date

09/11/2019

Business Purpose *

TV/FM Payment

Vendor Name

USPS PO 2558400538

City

Marquette, Michigan

Payment Type

Travel Card

Amount

25.50

Currency

US, Dollar

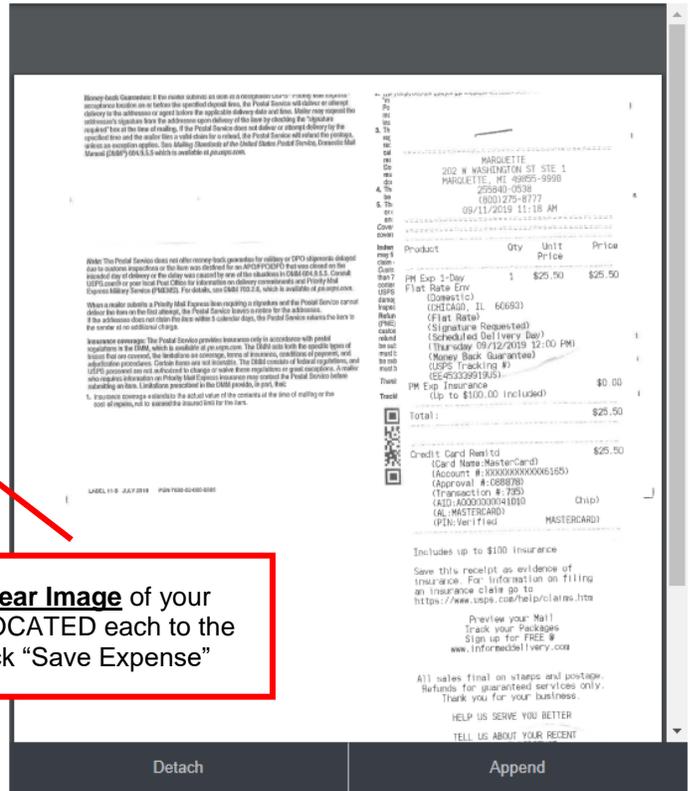
Personal Expense (do not reimburse)

Comment

Save Expense

Cancel

Make sure you have a **Clear Image** of your receipt, and you have **ALLOCATED** each to the correct account, then Click "Save Expense"



Once you have allocated and attached all receipts you will then click on Submit Report.

SAP Concur | Requests | **Expense** | Invoice | Approvals | App Center | Administration | Help | Profile

Manage Expenses | View Transactions | Process Reports

TV/FM Payment \$25.50

Not Submitted

More Actions

Submit Report

Report Details | Print | Manage Receipts

- Add Expense
- Edit
- Delete
- Copy
- Allocate
- Combine Expenses
- Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Travel Card	7191 Postage and shipping	USPS PO 2558400538 Marquette, Michigan	09/11/2019	\$25.50 Allocated
					\$25.50