ERS – First Time Users

Introduction

This document is an introduction to ERS for those who are logging in for the first time. It covers several options that should be taken to ensure you get the most out of ERS.

If you have any issues or questions please contact the Travel and Expense Specialist at expenses@queensu.ca or EX 75616. Alternatively you can contact the Reception for Financial Services at finance@queensu.ca.

** Students: Please note that if you are a Student you may have an employee NetID as well as your student NetID. When using ERS you will most likely be logging in using your employee NetID. In some cases, an individual will have access to ERS through both employee and student ID. If this is the case it is the responsibility of the claimant to ensure that they are using the correct account. Failure to do so may make it impossible for delegate and approvers to complete the needed tasks. If you are unsure, please contact expenses@queensu.ca.

Please Note:

- That in this document the words ‘Claim’ and ‘Report’ are interchangeable.
- SAP Concur refers to the company that created and maintains the ERS program, this is why some individuals will refer to the ERS as Concur.

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Logging into ERS

1) Go to the Queen’s Homepage, www.queensu.ca, and select the Search and Sign in button in the top right corner.

2) Select the “MyQueen’sU – Solus, MyHR and More” link

3) Scroll down until you see the Expense Reimbursement (ERS)/Concur icon, when you select it a drop down will open. You will need to select the “Log In to the ERS” link.
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4) Enter in your NetID and password. If your NetID is not recognized please contact the Travel and Expense Specialist, expenses@queensu.ca, to see if your ERS account has been deactivated. If your ERS account is showing as active, but your NetID is not allowing you to log in, you will have to contact ITS or try an alternate NetID.

5) Once you have logged in you will be on the main SAP Concur/ERS homepage. Select the “Profile” dropdown menu seen in the top right corner of your screen. To complete the items in this document you will be working from your profile page.

6) From the drop down select “Profile Settings”
7) This is a recommend step but is not necessary.

From your Profile Settings, select the “Personal Information” link in the main section or the list on the left. Since this is your first-time logging into ERS it is recommended that you go through the Personal Information screen and ensure that all information is correct. This will also be the starting point for any updates to your account that need to be made.

Also, if you are a Graduate Student who has a Student and Employee NetID for logging in please make note which of the two you are using.
Verify your Email Address

When you verify your email address you will have the option to receive emailed updates on the status of your claim. You will also be able to email receipts to receipts@concur.com and they will be uploaded to your ERS account, where they will be located under Available Receipts (aka Receipt Store). This is especially useful if you are traveling a lot, as you will not have to scan receipts one-by-one when the travel is completed.

1) From the list on the left select the Email Address link.

![Image showing Email Address Section of Personal Information]

2) You will be taken to the Email Address Section of your Personal Information.

![Image showing Email Addresses section]

3) You will see the email that has been associated with your ERS Account, you can verify this email or a different one (including gmail). Some individuals have two
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email address, we recommend verifying the email you use more frequently. You can have more than one email attached to your account.

4) Select the Verify link.

5) A window will open stating that an email was sent to the email address you have selected. Select “Okay”

6) A code will be sent to the email address you entered. The code will need to be entered into the box that has opened. Please note that it may take several minutes for the email to appear in your inbox. Please be sure to check your SPAM folder.

7) The code you are emailed will be approximately 20 characters long and will be a mixture of letters and numbers.
8) Copy and paste the code in the box provided and select OK

![Verify](image)

9) Once you have selected OK a new window will open telling your that your email address has been verified.

![Email Verification Status](image)

10) When you click on okay you will see a green circle with a check mark in it, this means you are succeeded in verifying your e-mail address.

![Verified](image)

11) You can now email receipts to [receipts@concur.com](mailto:receipts@concur.com) from the verified email accounts linked to your ERS profile, and they will be added to your account. You will also receive emailed updates on the status of any claims that you submit.
Setting up a Delegate

A delegate is someone who can act on your behalf to prepare and submit Cash Advance Request, Subject Advance Requests or Travel and Expense Claims. As the user you will be able to assign only the tasks that they are allowed to perform (e.g. a user that does not have approval rights in their position can not assign the Approver task to a delegate). This is an optional step, you do not have to set up a delegate.

Please Note: we do not recommend setting up a delegate for Cash Advance Requests or Subject Advance Requests. There have been cases in the past where requests are submitted multiple times. This does not mean that you can not, the process will be noted below, but it is advised that this be done with caution.

1) To set up a delegate, log into ERS, and go to your Profile

![Profile](image)

2) From the drop down select “Profile Settings”

![Profile Settings](image)

3) From the list on the left select with Request Delegates or Expense Delegates, the process of adding a delegate is the same for both options. For this document we will be using the Expense Delegate option.
4) A new screen will open, there should be no names currently listed.

5) Select the “Add” button.

![Add button](image1)

6) Once you have selected “Add” a new box will open. This is where you will search for the individual you want to add as your delegate. Please note you will need to search by last name.

![Search box](image2)

7) A drop down will open, continue typing until you see the name of the individual or scroll through the list to find them. Once you have found their name click on it.

![Drop down](image3)
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Please note that there may be a slight delay when you are typing. This can cause the cursor to move and you will have to reselect the box to continue typing. It is known issue with ERS.

8) After you have selected the individual their name will show in the list shown under step 5, however none of the check boxes will be filled.

![Delegates Table]

9) You will need to select the appropriate check boxes for your delegate.
   a. “Can Prepare” gives the delegate the right to create claims for you.
   b. “Can Submit Claims” give the delegate the right to submit claims on your behalf
   c. “Can Submit Requests” gives the delegate the right to submit Advance Requests on your behalf.
   d. “Can view Receipts” this box activated when “Can Prepare” is selected. This allows the delegate to view the receipts that you have uploaded.
   e. “Receive Emails” allowed ERS to send updates via email to your delegate regarding your claim.
   f. “Can Approve” this will only be active if you have approver status, and you will only be able to add an individual who is also an approver. This box gives your delegate the ability to approve claims on your behalf.
   g. “Can Approve Temporary” this will only be active if you have approver status. You can set a time line for when your delegate can approve for you, recommended for vacations.
   h. “Can Preview for Approver” this allows your delegate to review claims submitted for approval but not the ability to approve them. This is effective for budget checking.
   i. “Receive Approval Emails” will allow your delegate to receive emails from ERS regarding any approvals.

![Delegates Table]
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10) Once you have made your selection, click on the “Save” button, a notice will open indicating that your changes have been saved.

11) You can remove a delegate by deselecting the checkboxes and then saving.

Your delegate has been added!

Setting up a Default Approver for Expenses or Request

This is recommended if all your claims and requests will be submitted to the same individual. However, if you are cross-appointed or working under various projects this may not be ideal. ERS will automatically submit each claim and request to the same individual regardless of the chartfield information entered. You will not be asked to select an approver when you submit a claim or request, all claims will automatically be sent to the individual you set as your default approver.

1) To set up a default approver, log into ERS, and go to your Profile

2) From the drop down select “Profile Settings”
3) Go to select the “Expense Approvers” option from the “Expense Settings” menu on the left.

4) A new window will open, and you will be able to set up your Expense Approvers for claims and Subject Payment Advance Requests at the same time. Search for your approver by their last name and select from the list generated. Please note that if you will not need Subject Payment Advances you do not need to enter a name in the second box.

5) Once you have made your selection, click on the “Save” button, a notice will open indicating that your changes have been saved.

6) To set up your Request approver, select the “Request Approvers” from the “Request Settings” menu on the left.
7) A new window will open, and you will be able to search for your approver by last name. Select the name from the list generated.

8) Once you have made your selection, click on the “Save” button, a notice will open indicating that your changes have been saved.

You have added an Expense and Request Approver.
Setting up Default Chartfield Information

You can set up a default Chartfield (or accounting information) string for your expense report if you will always be using the same Fund, Department, and Project coding. This will prevent you from having to enter this information into every new claim you create. Please note that you will have to contact your department to verify the Chartfield Information that you should be using.

**NOTE:** You will not be asked to set a Program or Class, if these are required for a claim you will have to manually add them.

1) To set up a default approver, log into ERS, and go to your Profile

2) From the drop down select “Profile Settings”

3) Go to select the “Expense Information” option from the “Expense Settings” menu on the left.
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4) A new window will open. You will have to start typing in the Fund you want to use and then select from the drop-down menu. If you do not select from the drop-down menu you will not be able to move on to department selection.  
   **Note:** For this document we will be using Operating chartfield information.

![Expense Information](image1)

5) Once you have selected the Fund the Department box will become active. Start typing the Department number and select from the drop-down menu.

![Expense Information](image2)

6) Once you have selected the Department the Project box will become active. If your expenses will be charged to the operating account (not on a research project), the project number should be entered as 000000. If you will be claiming expenses for a research project, then you will have to enter in the project code given to you by your department or Research Accounting. Select the correct code from the drop-down menu.

![Expense Information](image3)

7) Select Save. A notice will open indicating that your changes have been saved.
You have created your default chartfield information. This can be updated if needed when you create a new claim.

**NOTE:** The Fund, Department and Project fields must ALL be completed. If one is missing you will receive an error message when you are creating a claim and will not be able to create and submit a new claim. Please ensure that all three boxes are filled, or if you do not have this information remove the numbers until you have acquired all three.

**Set up your Mobile Pin (for Concur Mobile)**

1) To set up your mobile pin to access Concur Mobile, log into ERS, and go to your Profile

2) From the drop down select “Profile Settings”

3) Select the “Concur Mobile Registration” link found under the “Other Settings” menu.
4) You will be taken to the Concur Mobile registration Page.

5) Enter your email address and select the "Get Started" button. A link will be sent to your email to download the SAP Concur App.

6) Once you have downloaded and installed the App, Step 1, you will have to log back into ERS on your computer and set up a PIN Number, Step 2 (see next page).
7) When you log back in to ERS go back to the Concur Mobile registration page and click on the “create a Concur Mobile Pin”. Two new boxes will open for you to enter your new PIN Number and then Verify.

8) Once you have entered your new PIN select the “Set Concur Mobile PIN”, and you will be able to access the SAP Concur App using your Queens NETID and this PIN Number.
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**NOTE:** you can not access the SAP Concur Mobile App using the password associated with your NETID - it has to be this PIN Number.

9) For information on how to use the SAP Concur Mobile App, please see the Andoid or iPhone Mobile Documents located on the Financial Services Website or email expenses@queensu.ca to have the correct document sent to you.

If you have any questions, comments or concerns, or would like further information or assistance, please contact Financial Services at 613-533-2050 or financial.services@queensu.ca

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