NBCUniversal
INTERNATIONAL

CONCUR EMEA
"ATTENDEES" "MEALS – MULTIPLE ATTENDEES" &
"GIFTS" USER GUIDE

ELSIE HUGHES
T&E Specialist, Fin Ops

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EXPENSE TYPE - Staff Entertainment
– Use only if ALL Attendees are NBC Universal Employees or Contractors

1. Required fields have a red vertical line

2. To add NBCU employees to the meal, click *Advanced Search*

EXPENSE TYPE - Staff Entertainment

3. Select *Employee/Contractor*

4. Enter last name, first name, or SSO
5. Click Search

Search Attendees ✕

| Search Attendees | Favorites | Recently Used | Attendee Groups |

Choose an Attendee Type
Employee/Contractor ▾

| First Name | Last Name | Organization | Employee ID |
| Szilvia | Pope | | |

6. Attendee type defaults to *Employee/Contractor*

Search   Reset

Search Results

| ☑ | Email Address | Attendee Name | | Attendee Type | Organization |
| ☑ | Szilvia.Pope@n... | Pope, Szilvia | | Employee/Contr... | NBCU |

7. Click *Add to Expense (& repeat for each employee to be included)*

| ◁ ◁ | Page 1 of 1 | ▷ ▷| | ↻ | Displaying 1 - 1 of 1 |

New Attendee   Add to Expense   Delete   Close

EXPENSE TYPE - Staff Entertainment

8. All attendees are listed as *Employee/Contractor* *(note: you need to add yourself !)*

EXPENSE TYPE - Business Entertainment
- use if 1 or more attendees are not NBC Universal employees or contractors

1. To add clients, vendors, suppliers, or other attendees, click *New Attendee*

New Expense | Available Receipts

Expense Type
Business Entertainment

Transaction Date
07/06/2015

Business Purpose
DB - Test Report - Jul 15

Vendor Name
Five Guys

City
London, Greater London

Payment Type
Due To Traveler

Amount
40.00 | GBP

☐ Personal Expense (do not reimburse)

Receipt Status
No Receipt

Does this require pre-approval in accordance with NBCU policy?
Yes

Approval Number
123456

Comment

Attendees/Recipients

👥 Attendees: 0 | Attendee Total: £0.00 | Remaining: £40.00

New Attendee | Advanced Search | Favorites | Search Recently Used | Remove | Create Group

☐	Attendee Name	Attendee Type	Organization	Amount

EXPENSE TYPE – Business Entertainment

2. Select the *Attendee Type* from the drop down menu

EXPENSE TYPE – Business Entertainment

3. Fill in all required information

Add Attendee ✕

Attendee Type
Other Attendee ▼

First Name
Andy

Last Name
Carroll

Organization
WH plc

Position
Finance Director

4. click *Save* or *Save & Add Another* if more attendees were present

[Save & Add Another] [Save] Cancel

EXPENSE TYPE – Business Entertainment

5. Each attendee has their proper Attendee Type label

EXPENSE TYPE– Meals Employee Only

Use this Expense Type for meals for one employee only

EXPENSE TYPE – Meals – Multiple Attendees
(a new expense type)

Use Meals – Multiple Attendees when there is more than one employee & it is not staff entertainment

Add the attendees in the same way as Staff Entertainment

Creating Attendee Groups

- for groups of attendees that will be used again

Example of setting up a department as a group for frequent use – select the attendees as per slides above

Creating Attendee Groups
- for groups of attendees that will be used again

1. Select the Attendees required and "Create Group"

Attendees/Recipients   Attendees: 4 | Attendee Total: £125.00 | Remaining: £0.00
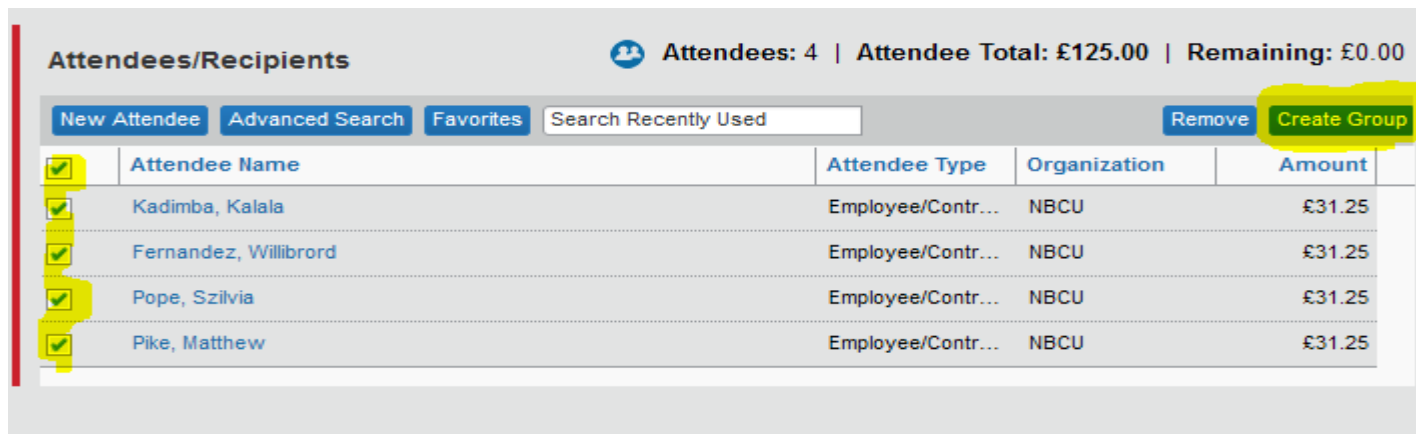
New Attendee | Advanced Search | Favorites | Search Recently Used | Remove | Create Group

☑	Attendee Name	Attendee Type	Organization	Amount
☑	Kadimba, Kalala	Employee/Contr...	NBCU	£31.25
☑	Fernandez, Willibrord	Employee/Contr...	NBCU	£31.25
☑	Pope, Szilvia	Employee/Contr...	NBCU	£31.25
☑	Pike, Matthew	Employee/Contr...	NBCU	£31.25

2. Enter Group Name & Save

Create Group   ✕

Enter Group Name: P2P Department

Save   Cancel

Creating Attendee Groups
- for groups of attendees that will be used again

To select saved group – create expense & select "Favourites"

Creating Attendee Groups
- for groups of attendees that will be used again

Go to Attendee Groups tab and select the group & "Add to Expense"

Close and save and the group will be on the expense transaction

Creating Attendee Groups
- for groups of attendees that will be used again

Save the Expense

Creating Favourites in Attendees

Go to Profile – Profile Settings – Under Expense, Favourite Attendees

Creating Favourites in Attendees

To add an employee – go to Advanced Search and select attendee type "employee/contractor", enter part of name and search, select and add to favourites

Gifts &Business Entertainment - Useful Links

1. From the UK Travel Portal uk.travel.nbcuni.com – go to Policies & Advisories – NBCU Entertainment Guidelines and follow the links

2. GBE policy: http://my.inbcu.com/sites/default/files/documents/NBC008-2015%20CODE_v1.pdf#page=24

2. Further guidance for Authorised Approvers is provided in http://my.inbcu.com/story/benefits/guidelines-authorized-giftsbusiness-ent Click on the "here" in the first para)

3. Guidelines on Business Entertainment (Inc Non-Gov interaction) https://wave.nbcuni.com/docs/DOC-14604

4. GBE Decision Trees https://wave.nbcuni.com/docs/DOC-2219

5. GBE Key Facts
https://wave.nbcuni.com/people/206415686/blog/2015/08/13/gifts-and-business-entertainment-key-facts

Pre-approval (Business Entertainment & Gifts Non-Employee)

For Business Entertainment and Gifts - Non Employee expenses which require pre -approval, please attach the approval as a second receipt

To do this, save the approval as a pdf before attaching to the expense line

Device Policy - IT

IT equipment should not be purchased or repaired using corporate credit cards

Purchase

All requests for new devices are to be raised via MyTechnology

Asset Management

Assets will be recorded in myTechnology against the requestor / user during the setup

Security

All devices will need to pass IT & Security testing

For full details, use this link

https://nbcu.service-now.com/kb_view_customer.do?sys_kb_id=98c097c86f3f3d4024b53ea0be3ee42c&sysparm_nameofstack=&sysparm_kb_search_table=

Gifts - Employee

When purchasing gifts for employees, ensure that the reason for and the description of the gift is entered into the Comments field - $150 limit for lifecycle events only

If it is a retirement gift then HR co-ordination is required

Gifts – Non Employee

Ensure that the reason for and the description of the gift is in the Comments field.

Also include the name and company in the Gift Recipient Name. If the amount is to exceed $250 or the gift is for Government Officials, **pre-approval** is required. Go to uk.travel.nbcuni.com under Policies and Advisories – NBCU Entertainment Guidelines for more detail

The recipient type at the moment has options of Client, Other or Supplier/Vendor – this may change to include Government Official

FAQs

Most Questions can be answered by going to the T&E portal - please check here first before contacting the travel help desk

nl.travel.nbcuni.com

It contains:

      The Expenses Policy

      The Entertainment Policy

      Credit Card Services

      Travel Insurance

Concur – Tool Tips

Around the pages of Concur you will see these arrow heads – Concur refers to them as Tool Tips

They contain useful info relating to the data you should be entering.

Hover your mouse over the arrow head and a pop up box appears

Business Purpose ?
Test1
BUSINESS PURPOSE: Start with initials & end with MMM/YY. EX: DB-xxxx-JUL14
Cost Object
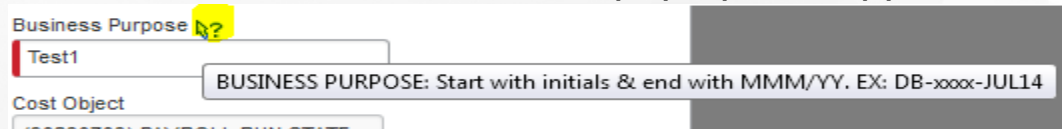
FAQs

Where are my claims ?

Any claims that are in process (not approved/extracted for payment)

Navigate to Expenses – Manage My Expenses

FAQs

You will see claims not submitted, submitted and returned

Returned claims need some action – read the comments

Submitted claims show who they are sitting with

The first step is either Accounting Review or Concur Audit.

Accounting Review will process claims within 48 hours and Concur Audit within 72 hours

The next step is with the line manager for approval – this also confirms your claims have gone to the correct approver

Once claims are approved by the line manager they are extracted for payment and will no longer be available on this page

These claims are available in the Report Library (Expense – Manage Expenses)
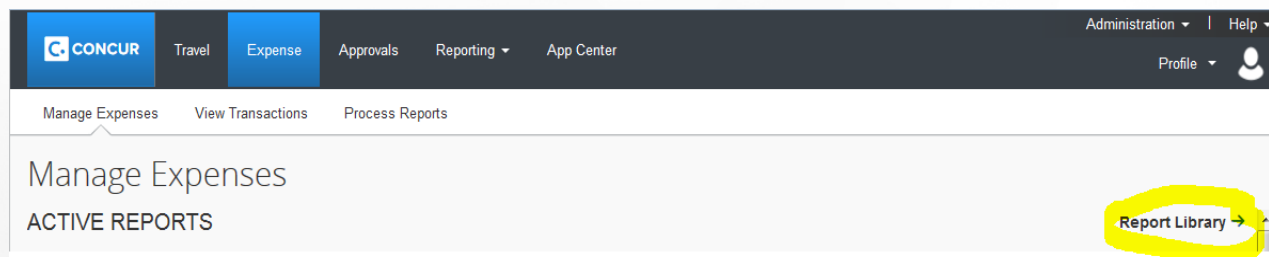
FAQs

The Report Library defaults to the last 90 days – select View and change to All Reports or any other suitable option.

All reports are here – they do not disappear !

FAQs

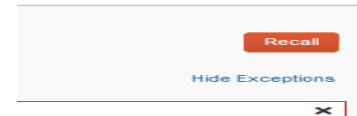Any claims that have not been extracted for payment may be recalled for amendment – if it's on the Manage Expenses page you may recall it – go t to the claim and in the top right is the recall button
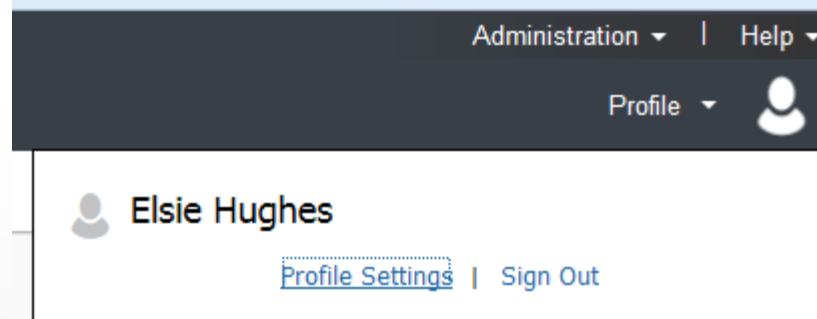
Make the necessary amendments and submit again

Profile

Navigate to Profile, Profile Settings to see your **own** details

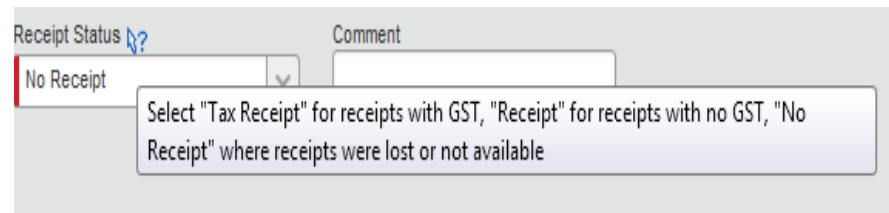Approvers, Credit Cards & Personal Details are held here

FAQs

RECEIPTS – Receipt Status

There are 3 options:

Where no receipt is available select "No Receipt"

If the receipt contains a VAT number select "Tax Receipt" and for receipts with no VAT number select "Receipt"
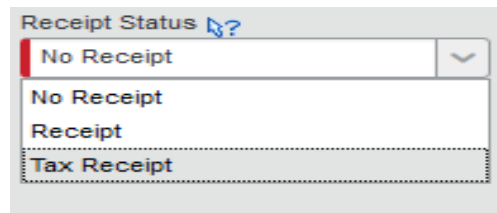
Here's an example of a tool tip – although it refers to GST, which is General Sales Tax, the US equivalent of VAT

Selecting the correct receipt type expedites the claim through Accounting Review and Concur Audit, as well as ensuring our VAT Returns are accurate.

Missing Receipts – if a receipt has been lost the card holder (this is not available to delegates) must complete a missing affidavit (go to receipts – missing affidavit). These are a legal agreement between the cardholder and NBC. Any transactions with no receipts trigger audits, so please try to ensure they are kept

FAQs

PERSONAL EXPENSES ON CORPORATE CARDS

Please do not use your corporate cards for personal expenses, unless it is an absolute emergency. Any funds owed should be repaid as soon as you receive email notification with the banking details

Am I Allowed to buy gifts for employees ?

Gifts to employees are prohibited, except for lifecycle events (wedding, birth) and is at the manager's discretion – please enter the reason for the gift in the comments section

Gifts for retirement must be coordinated through the Human Resources department - give the HR contact in the comments section

One gift per event from the Company (i.e. not per employee) up to $150 (approx £100) is allowed.

Gifts for performance are prohibited and should go through the GEM system

Leaving gifts & Xmas gifts are also not allowed