

## Concur Expense QuickStart Guide



SAP Concur  
Technologies  
Version 2.1

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- Concur Travel & Expense
- Concur Invoice
- Concur Expense
- Concur Travel
- Concur Request
- Concur Locate
- SAP Concur for Mobile

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**NOTE:** The SAP Concur application is expressly for the use of Stony Brook employees using State or Research Foundation funding for their travel expenses.

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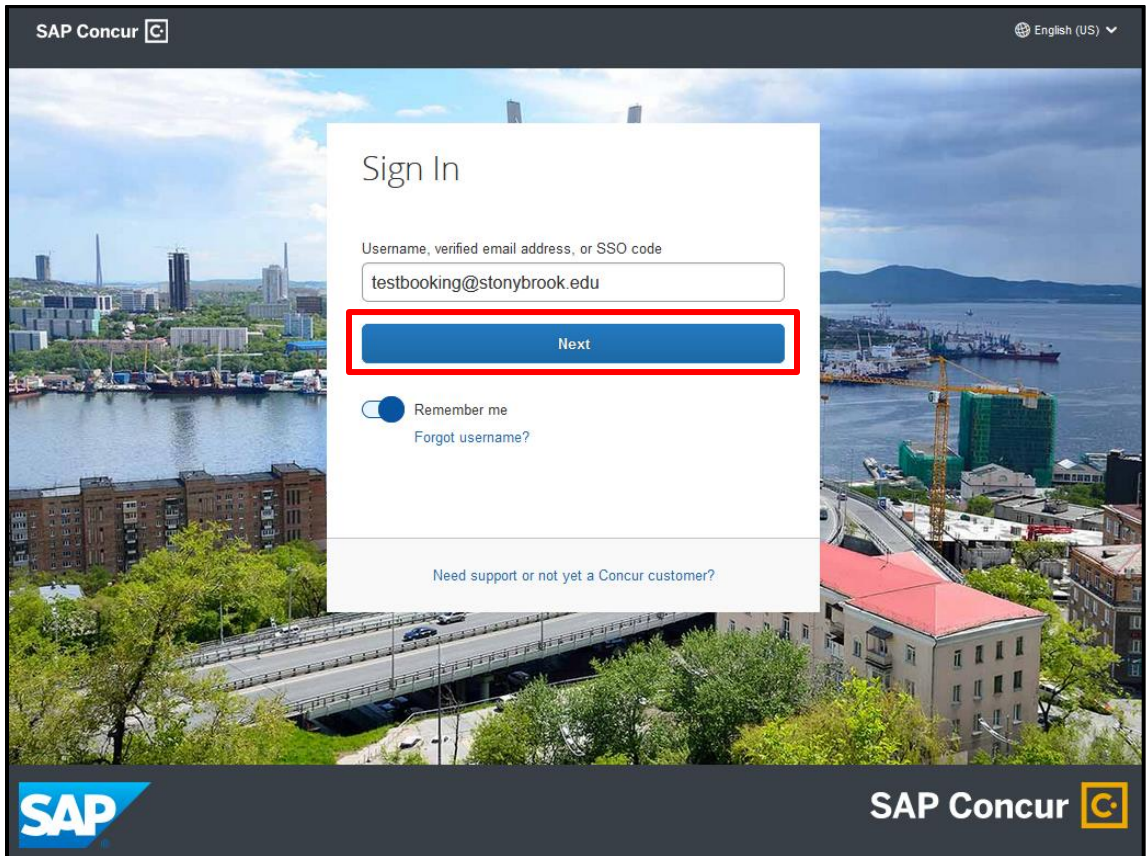
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## Signing in to SAP Concur

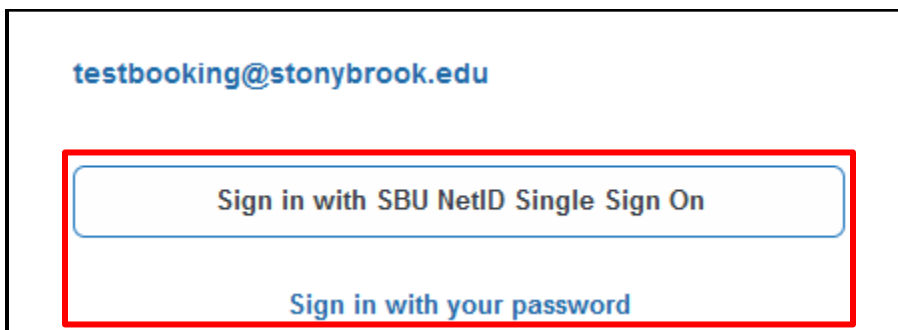
### To sign in to SAP Concur

1. To sign in to SAP Concur, on the **Sign In** screen, enter **<your 9-digit Stony Brook ID number>@stonybrook.edu** (example: **123456789@stonybrook.edu**) in the field, and then click **Next**.

You can select the **Remember me** check box to store your password, so that you don't have to enter it the next time you sign in to SAP Concur from this device.



2. Select **Sign in with SBU NetID Single Sign On**.

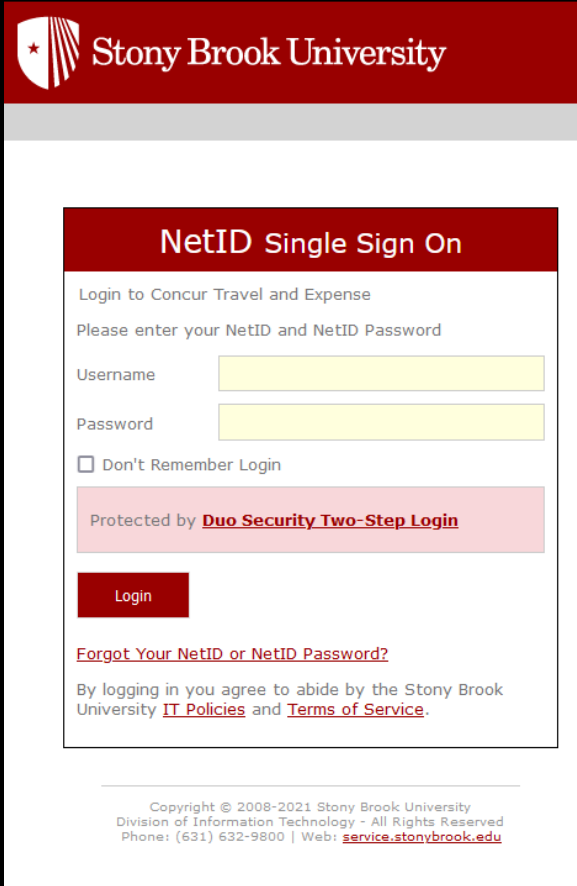


3. Fill in your NetID **Username** and NetID **Password**.

NOTES:

- Your password is case sensitive.
- If you are not able to log in with your NetID, please visit:

<https://it.stonybrook.edu/services/netid> for assistance.



**Stony Brook University**

### NetID Single Sign On

Login to Concur Travel and Expense

Please enter your NetID and NetID Password

Username

Password

Don't Remember Login

Protected by **Duo Security Two-Step Login**

**Login**

[Forgot Your NetID or NetID Password?](#)

By logging in you agree to abide by the Stony Brook University [IT Policies](#) and [Terms of Service](#).

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Phone: (631) 632-9800 | Web: [service.stonybrook.edu](https://service.stonybrook.edu)

## Exploring the SAP Concur Home Page

The SAP Concur home page contains the following sections.

**NOTE:** To return to the SAP Concur home page from any other page, click the SAP Concur logo on the top left of the screen.

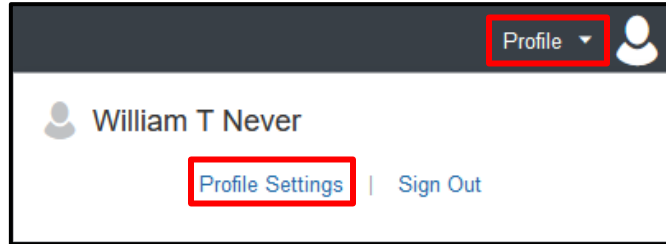
Section	Description
Quick Task Bar	<p>This section provides Quick Tasks (links) so you can:</p> <ul style="list-style-type: none"> <li>Start a new expense report, travel request, cash advance, etc.</li> <li>Open expense reports and requests*</li> <li>Manage available expenses</li> </ul> <p>* A request is an authorization for an expense made <i>before</i> incurring the cost. An expense report is the summation of all expenses <i>after</i> the costs are incurred.</p>
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.
My Trips	This section lists your upcoming trips.
Alerts	This section displays informational alerts about Travel features.
Company Notes	Content is provided by the Procurement Travel Office.

The screenshot displays the SAP Concur home page interface. At the top, there are navigation tabs for Requests, Travel, Expense, and App Center. The user is identified as William from Stony Brook University. A summary bar shows four key metrics: 06 New, 06 Authorization Requests, 03 Available Expenses, and 03 Open Reports. Below this, the 'MY TRIPS (1)' section shows an upcoming trip for NOV 01-01 labeled 'Conference'. The 'ALERTS' section contains two informational messages. The 'COMPANY NOTES' section provides a welcome message and contact information for the SBU Travel Website. The 'MY TASKS' section lists three items: 06 Open Requests (City Purpose Date \$1,724.98), 03 Available Expenses (JetBlue \$125.00), and 03 Open Reports (City Purpose Date \$4,321.26).

## Updating Your Expense Profile

Use the **Profile Options** page to set or change your personal preferences. To avoid re-entering personal and permanent information about yourself, complete your profile after logging onto SAP Concur for the first time and review/update it whenever your information changes. Your profile options include:

- Approvers
- Attendees
- E-Receipts
- Expense Delegates
- Expense Preferences:

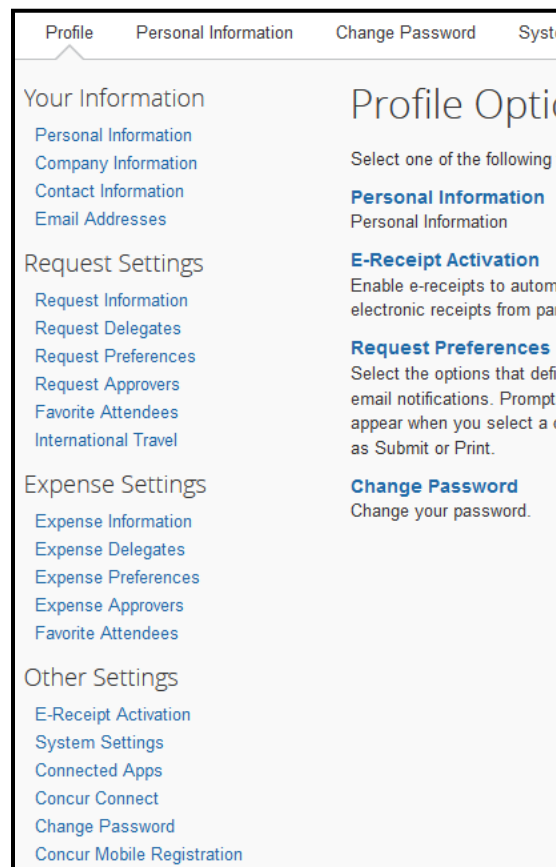


### To access your profile information

1. Click **Profile > Profile Settings**.  
The **Profile Options** page appears.
2. Click the appropriate option from the left-side menu.

At a minimum, you should do the following:

- Verify your primary email address is correct and add any additional email addresses that you will be using to submit receipts.
- Verify and update your **Personal Information**.
- Review the information is accurate under **Expense Information**.
- Verify that the name of your **Expense Approver** is correct. This person should be your supervisor and the first approver in your workflow. If the data is incorrect, ask your supervisor to contact the VP Coordinator to resolve the issue with HRS – Class & Comp.



### Delegates

If you are acting as a *delegate* for another employee (the *delegator*):

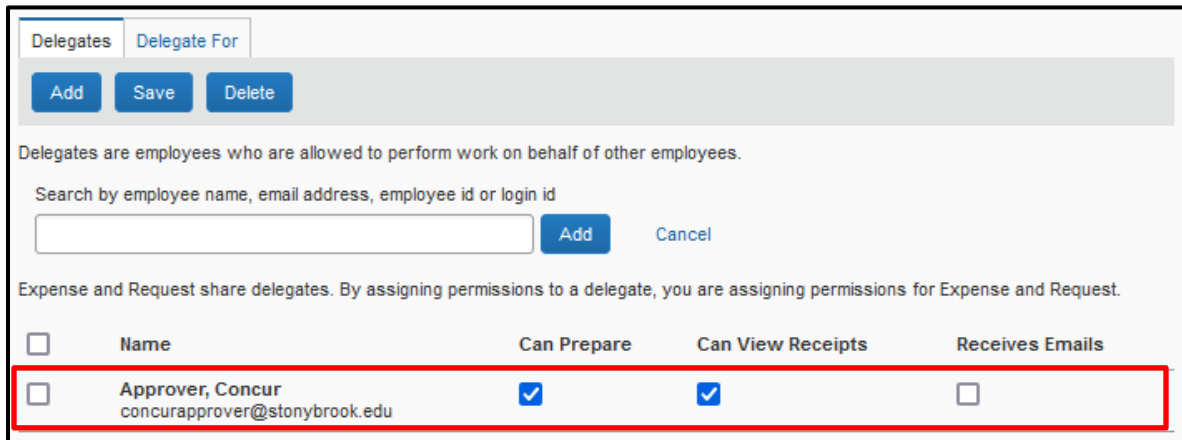
- Any changes you make on this page affect only the delegator and do not change your personal information.
- You cannot access all profile options for your delegator.



## Assigning a Delegate

### To assign a delegate

1. Click **Profile > Profile Settings**. The Profile Options page appears.
2. Click **Expense Delegates** from the left-side menu, then **Add**.
3. Locate the appropriate employee using the **Search by...** field, then click **Add**.
4. Select the checkboxes to set the delegate's permissions.



Delegates [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

[Add](#) [Cancel](#)

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	Approver, Concur concurapprover@stonybrook.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Can Prepare** enables the delegate to prepare a report/request but not submit it.

5. After selecting the appropriate checkboxes, click **Save**.

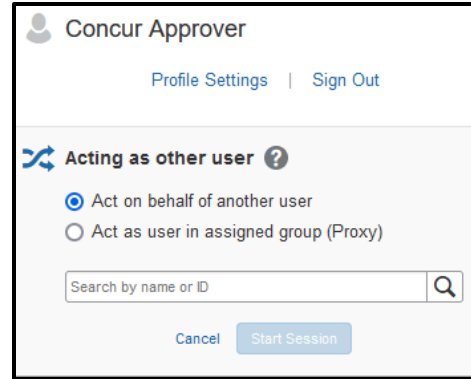
NOTE: Selecting **Can Prepare** automatically enables **Can View Receipts** because receipts are integral to preparing a report.

## Acting as a Delegate

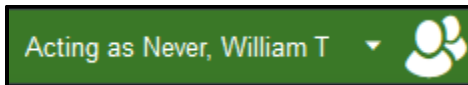
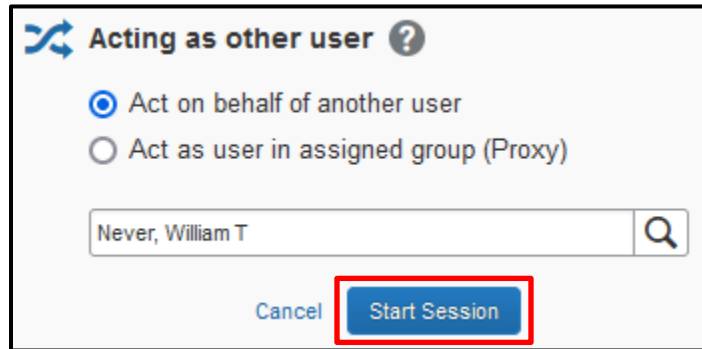
If you are a delegate, your delegator will define which tasks you can complete, such as preparing reports, receiving Concur-related notifications, etc.

### To work as a delegate

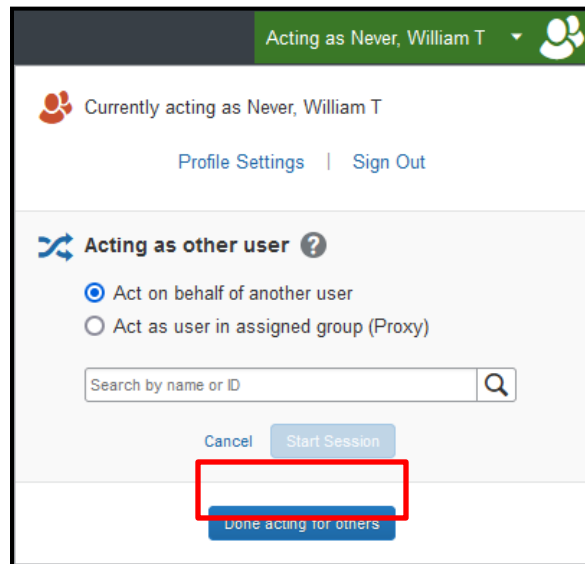
1. Click **Profile** then **Act on behalf of another user**.
2. Click on the magnifying glass icon to view a list of the employees that you have as their delegate.
3. Select the appropriate delegator's name from the list.
4. Click **Start Session**.



Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.



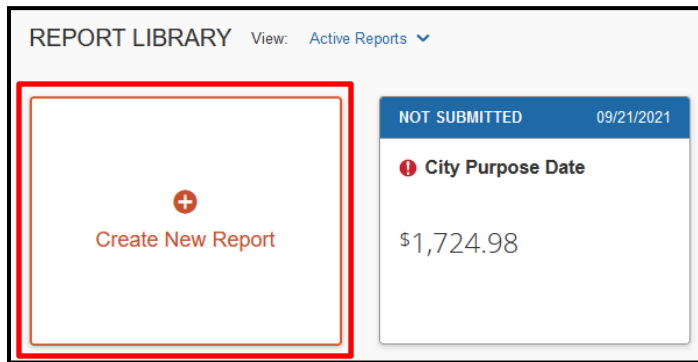
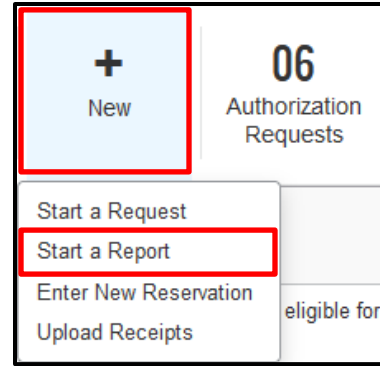
5. You are now officially working on behalf of that person. Complete the normal processes for creating reports, printing, etc.  
To select a different user, follow the same steps but click a different name.
6. To return to your own tasks, click **Acting as**, and then select **Done acting for others**.



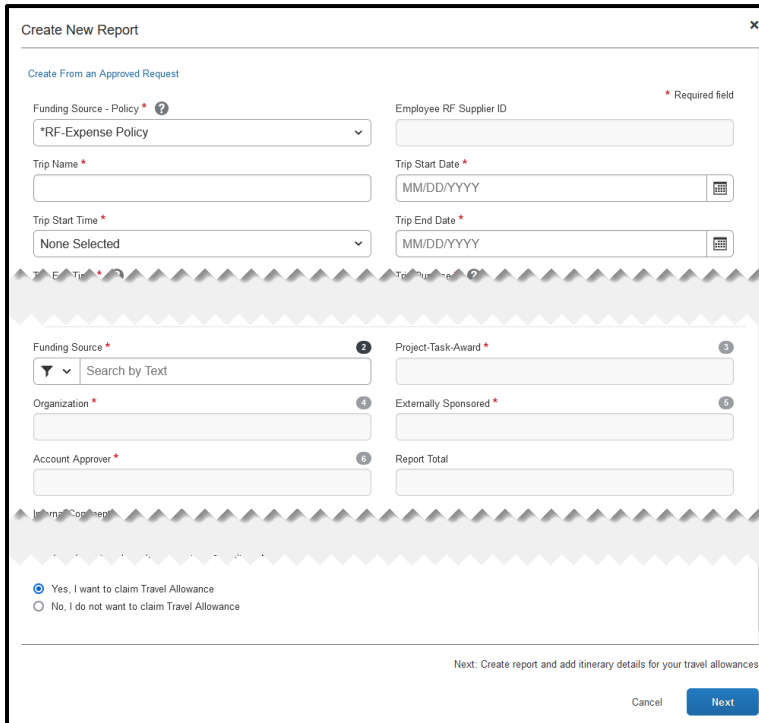
## Creating a New Expense Report

To create a new expense report

- Choose:
  - On the SAP Concur home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.  
– OR –
  - From the **Expense** menu, click **Manage Expenses** (on the **Expense** sub-menu), and then click the **Create New Report** tile.



- Complete all of the required fields (marked with red asterisks). The fields that appear vary based on the **Policy** selected: *RF-Expense Policy*



## STATE-Expense Policy

Create New Report ✕

Create From an Approved Request

Funding Source - Policy \* ?  ✕ Employee State N # \* Required field

Trip Name \*  Trip Start Date \*  📅

Trip Start Time \*  Trip End Date \*  📅

Trip End Time \* ? Trip Purpose \* ?

---

Funding Source \* 2  Account \* 3

Account Approver \* 4  Fiscal Year \*  ✕

Report Total

Internal Comment

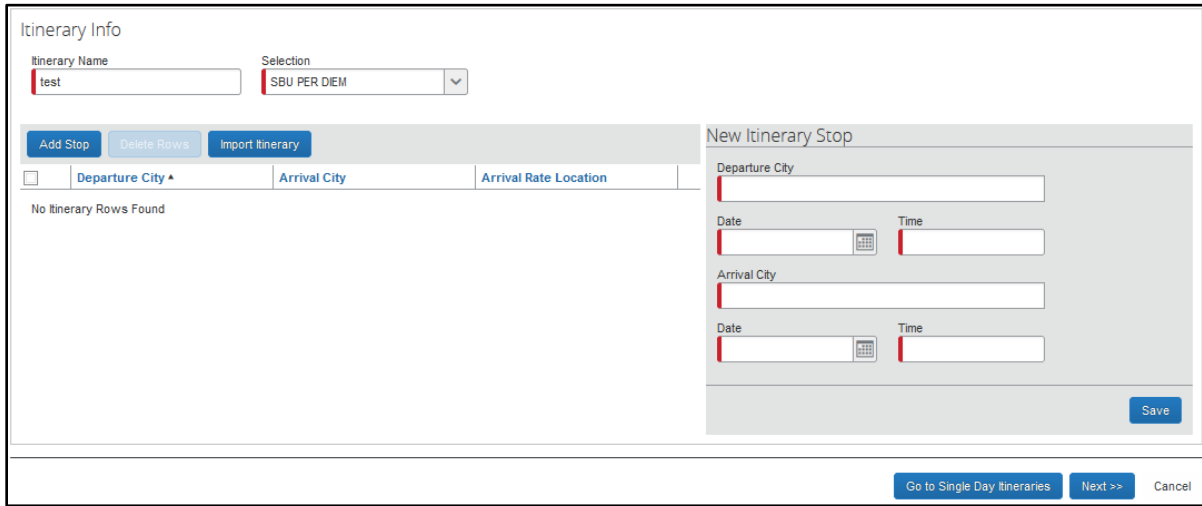
Yes, I want to claim Travel Allowance  
 No, I do not want to claim Travel Allowance

Next: Create report and add itinerary details for your travel allowances

Cancel

3. Click **Next**.
4. The Travel Allowances pop-up window appears. Select **Yes** to create Per Diem meal expenses for each day of the trip – OR – click **No** to generate the report without Per Diem expenses and proceed to step #13.

5. IF you selected **Yes**, the Itinerary Info page opens.

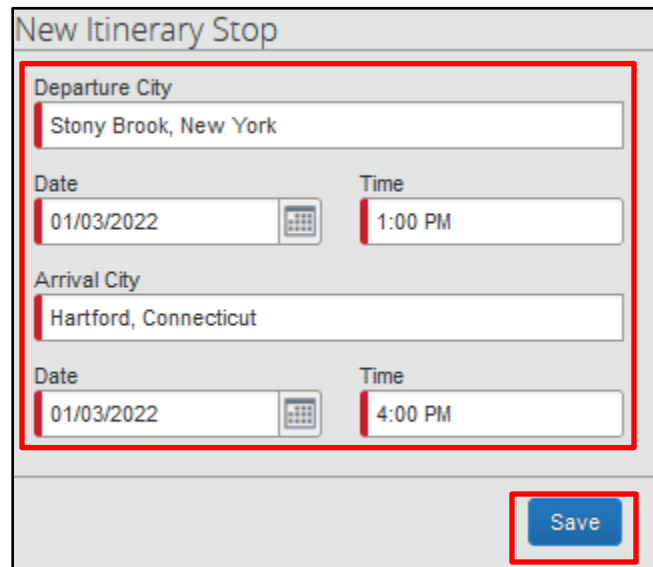


6. Complete the fields for the **New Itinerary Stop** based on your travel.

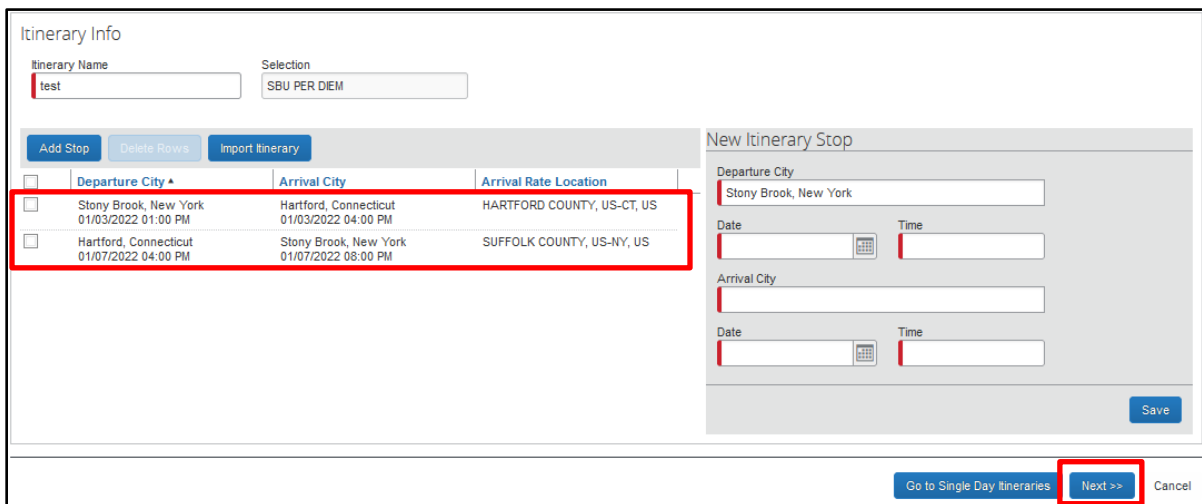
7. Click **Save**.

8. Add additional **New Itinerary Stops**, as needed, based on your trip and **Save** them.

**NOTE:** At a minimum, you should have two stops, the outbound and return legs of your trip.



9. After adding in all itinerary stops, click **Next**.



<input type="checkbox"/>	Departure City *	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Stony Brook, New York 01/03/2022 01:00 PM	Hartford, Connecticut 01/03/2022 04:00 PM	HARTFORD COUNTY, US-CT, US
<input type="checkbox"/>	Hartford, Connecticut 01/07/2022 04:00 PM	Stony Brook, New York 01/07/2022 08:00 PM	SUFFOLK COUNTY, US-NY, US

10. Click **Next** to assign the selected itinerary and create the Per Diem expenses.

Assigned Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
<b>Itinerary: test</b>				
Stony Brook, New York	01/03/2022 01:00 PM	Hartford, Connecticut	01/03/2022 04:00 PM	HARTFORD COUNTY, US-CT, US
Hartford, Connecticut	01/07/2022 04:00 PM	Stony Brook, New York	01/07/2022 08:00 PM	SUFFOLK COUNTY, US-NY, US

Available Itineraries

Current itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
<b>Itinerary: Training</b>				
New York, New York	11/22/2021 07:00 AM	Dallas, Texas	11/22/2021 12:00 PM	DALLAS COUNTY, US-TX, US
Dallas, Texas	11/29/2021 05:00 PM	New York, New York	11/29/2021 11:59 PM	NEW YORK COUNTY, US-NY, US

11. Click on the checkboxes to exclude meals from your per diem, as necessary. For instance, if you had breakfast at home on your first day of travel, you should select the **Exclude Breakfast** checkbox for that meal because it is not included in your per diem. Similarly, if you are attending a hosted event that provides breakfast and dinner, you should exclude both expenses from your per diem.

**NOTE:** The daily **Allowance** amount will change to reflect your adjusted per diem.

Show dates from  to

Exclude   All <input type="checkbox"/>	Date/Location	Exclude Breakfast	Exclude Dinner	Allowance
<input type="checkbox"/>	01/03/2022 Hartford, Connecticut	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	01/04/2022 Hartford, Connecticut	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00
<input type="checkbox"/>	01/05/2022 Hartford, Connecticut	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	01/06/2022 Hartford, Connecticut	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	01/07/2022 Hartford, Connecticut	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$14.00

12. After selecting all of the meal exclusions, click **Create Expenses**.

Report Details <span>▼</span> Print/Share <span>▼</span> Manage Receipts <span>▼</span> Travel Allowance <span>▼</span>						
Add Expense Edit Delete Copy Allocate Combine Expenses Move to <span>▼</span>						
<input type="checkbox"/>	Receipt <span>↑↓</span>	Payment Type <span>↑↓</span>	Expense Type <span>↑↓</span>	Vendor Details <span>↑↓</span>	Date <span>☰</span>	Requested <span>↑↓</span>
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/07/2022	\$14.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/06/2022	\$69.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/05/2022	\$69.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/03/2022	\$55.00
						<b>\$207.00</b>

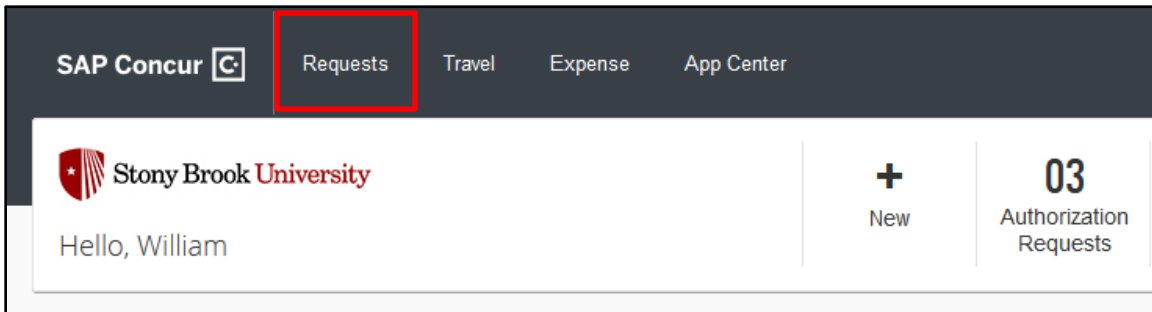
13. The **Meals – Per Diem** expenses now appear in your report. At this point, you will likely either:

- Add an out-of-pocket expense to your expense report
- Add University-provided credit card (NET & Travel cards) transactions to your expense report

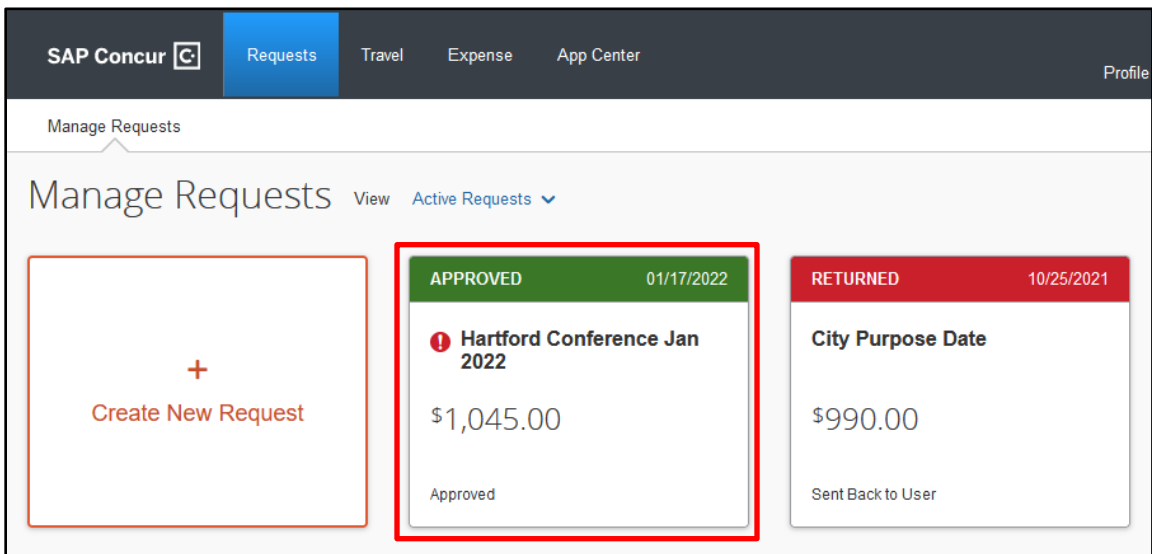
## Creating a New Expense Report from a Request

To create a new expense report from within an approved request

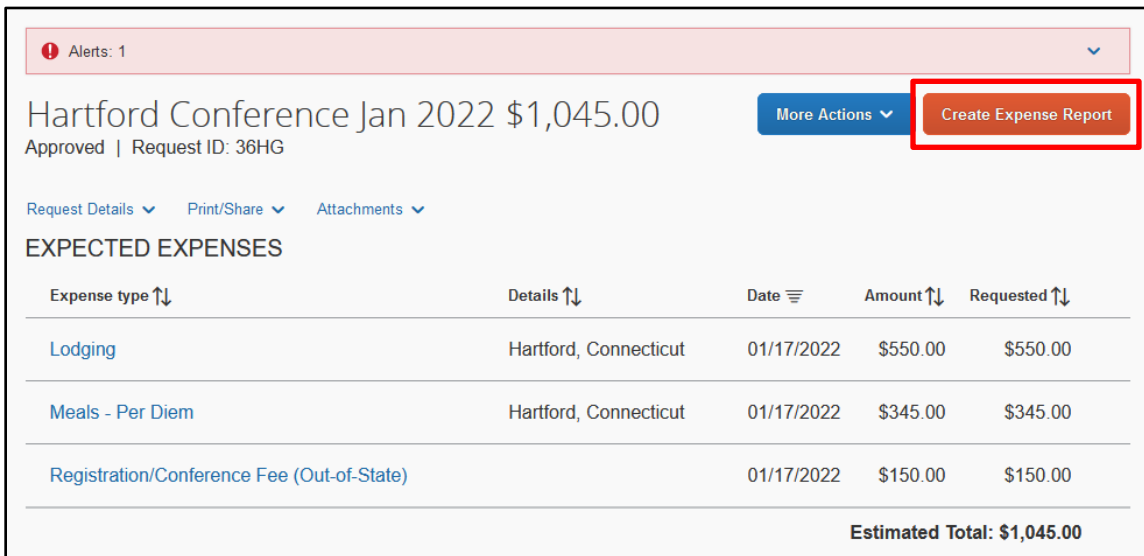
1. On the SAP Concur home screen, click on the **Requests** tab.



2. Click on the tile of the approved request.

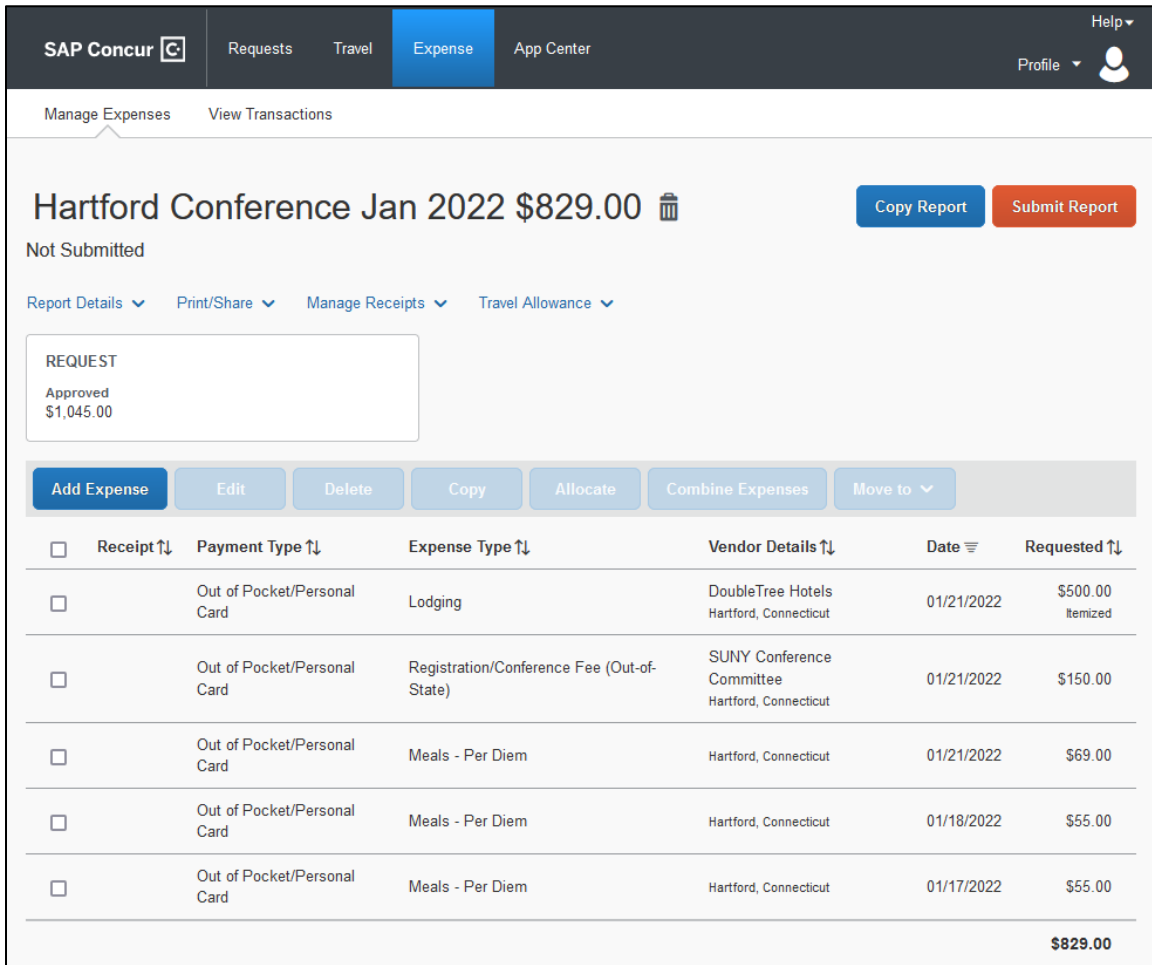


3. Click on the **Create Expense Report** button.





- The data from your request is imported into a new expense report. The expense report opens for editing.



The screenshot shows the SAP Concur Expense Report interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense' (selected), and 'App Center'. The main header displays 'Hartford Conference Jan 2022 \$829.00' with a trash icon and buttons for 'Copy Report' and 'Submit Report'. Below this, it indicates 'Not Submitted' and provides options for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' box shows 'Approved \$1,045.00'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main table lists expenses with columns for Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested amount.

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>		Out of Pocket/Personal Card	Lodging	DoubleTree Hotels Hartford, Connecticut	01/21/2022	\$500.00 Itemized
<input type="checkbox"/>		Out of Pocket/Personal Card	Registration/Conference Fee (Out-of-State)	SUNY Conference Committee Hartford, Connecticut	01/21/2022	\$150.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/21/2022	\$69.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/18/2022	\$55.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Hartford, Connecticut	01/17/2022	\$55.00
						<b>\$829.00</b>

- You should now:
  - Review the data in each automatically added expenses
  - Address any alerts that appear on screen
  - Add any necessary expenses (based on your expenditures and receipts) that were not imported into the report

## Adding Card Transactions to an Expense Report

On the SAP Concur home page, you can view a list of any unassigned credit card transactions in the **Available Expenses** section.

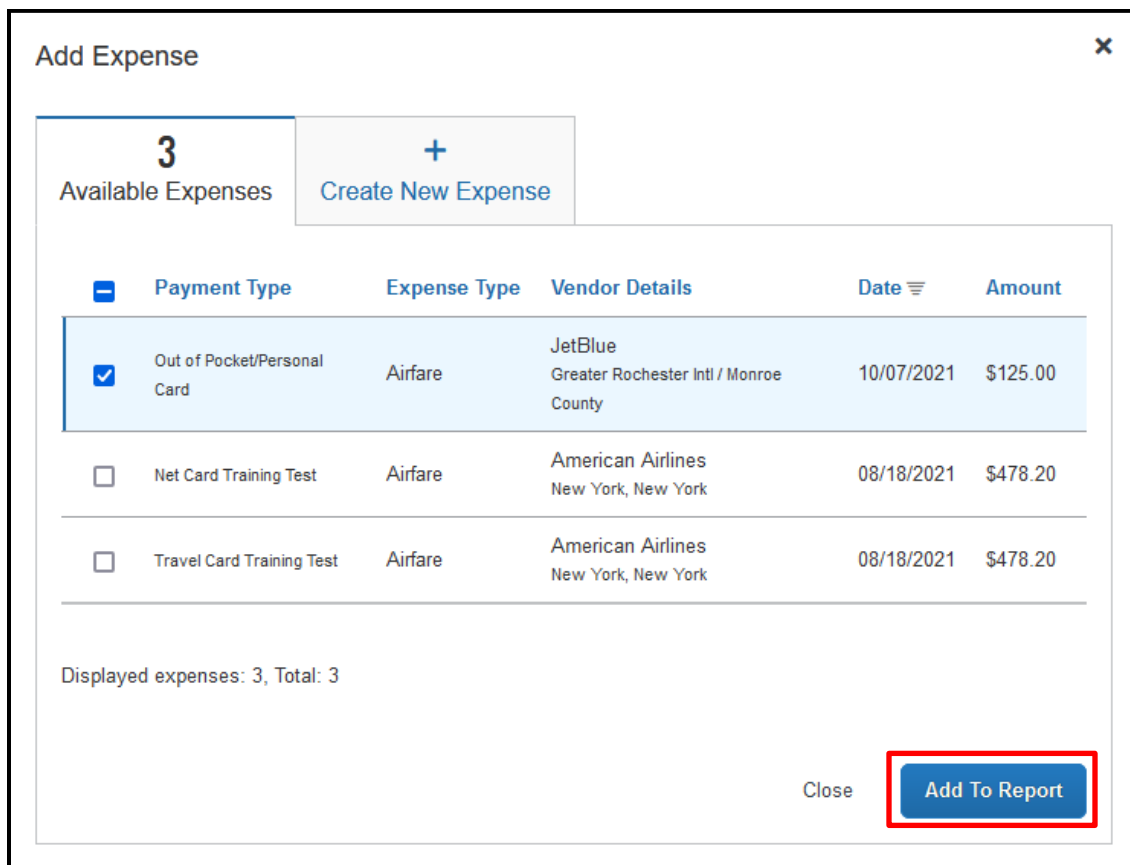
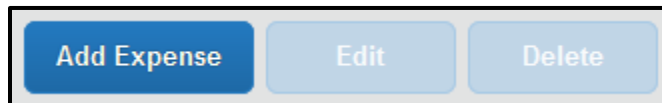
You can add card transactions to an expense report in the following ways:

- From the open expense report
- From the **Available Expenses** section

### From the open expense report

To add card transactions within the open report

1. Click **Add Expense**.
2. From the **Available Expenses** tab, select the checkbox(es) for the appropriate expenses.



The screenshot shows the 'Add Expense' dialog box. At the top, it says 'Add Expense' with a close button (X). Below that, there are two tabs: '3 Available Expenses' (selected) and '+ Create New Expense'. The main area contains a table with the following columns: Payment Type, Expense Type, Vendor Details, Date, and Amount. The table has three rows of data. The first row is selected and has a checked checkbox. The second and third rows have unchecked checkboxes. At the bottom of the dialog, there is a 'Close' button and an 'Add To Report' button, which is highlighted with a red box.

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>	Out of Pocket/Personal Card	Airfare	JetBlue Greater Rochester Intl / Monroe County	10/07/2021	\$125.00
<input type="checkbox"/>	Net Card Training Test	Airfare	American Airlines New York, New York	08/18/2021	\$478.20
<input type="checkbox"/>	Travel Card Training Test	Airfare	American Airlines New York, New York	08/18/2021	\$478.20

Displayed expenses: 3, Total: 3

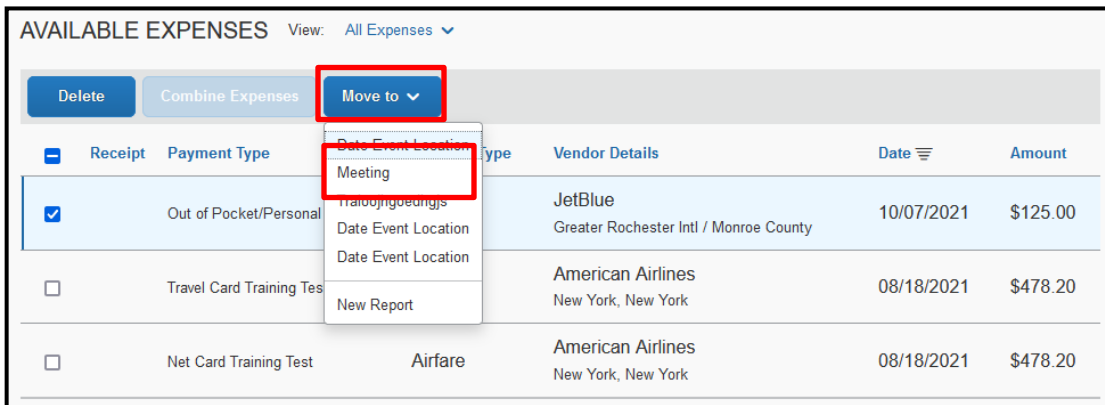
Close **Add To Report**

3. Click **Add To Report**.

## From the Available Expenses section

### To assign transactions to a report from the Available Expenses section

1. From the **Available Expenses** section, select the checkbox associated with the appropriate expense.  
**TIP:** Select the uppermost check box to select all transactions.
2. Click **Move to**.
3. Select the name of the appropriate report or select **New Report**.
  - If you select an existing report, the report opens and the selected transactions are attached to the report.
  - If you select **New Report**, the **Create New Report** page appears. Enter the report information as usual.



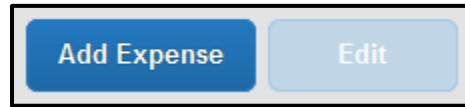
The screenshot shows the 'AVAILABLE EXPENSES' section with a 'View: All Expenses' dropdown. Below the header are three buttons: 'Delete', 'Combine Expenses', and 'Move to'. The 'Move to' button is highlighted with a red box, and its dropdown menu is open, also highlighted with a red box. The dropdown menu contains the following options: 'Meeting', 'Training/Meetings', 'Date Event Location', 'Date Event Location', and 'New Report'. Below the menu is a table of expenses with columns for Receipt, Payment Type, Vendor Details, Date, and Amount.

Receipt	Payment Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>	Out of Pocket/Personal	JetBlue Greater Rochester Intl / Monroe County	10/07/2021	\$125.00
<input type="checkbox"/>	Travel Card Training Test	American Airlines New York, New York	08/18/2021	\$478.20
<input type="checkbox"/>	Net Card Training Test	Airfare American Airlines New York, New York	08/18/2021	\$478.20

## Adding an Out-of-Pocket Expense to an Expense Report

### To add an out-of-pocket expense to a report

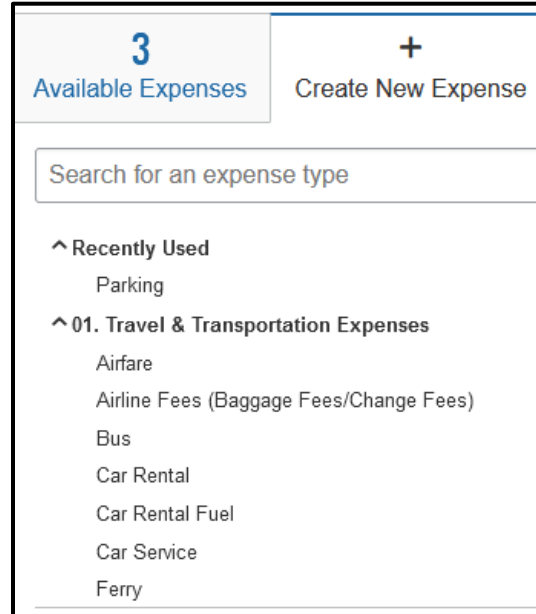
**NOTE:** Out-of-pocket expenses refer to expenses you purchased with your own money. Be advised that the Travel Office determines which expenses can be reimbursed.




1. From the open report, click **Add Expense**, and then click the **Create New Expense** tab.
2. Search for or select the appropriate expense type from the list.


The page refreshes, displaying the required and optional fields for the selected expense type.

3. Complete the required fields then select one of the following:
  - **Attach Receipt Image** – To upload and attach receipt images
  - **Itemizations tab** – To itemize the expense
  - **Save Expense** – To save the out-of-pocket expense
  - **Cancel** – To exit without saving this expense




*New Expense*
Cancel Save Expense

Details Itemizations
Hide Receipt 

 **Allocate**

\* Required field

Expense Type \* ▼

Transaction Date \* MM/DD/YYYY       Trip Purpose

Destination City ▼       Payment Type \* ▼

Amount \* 0.00      Currency \* ▼

Comment

+

Attach Receipt Image

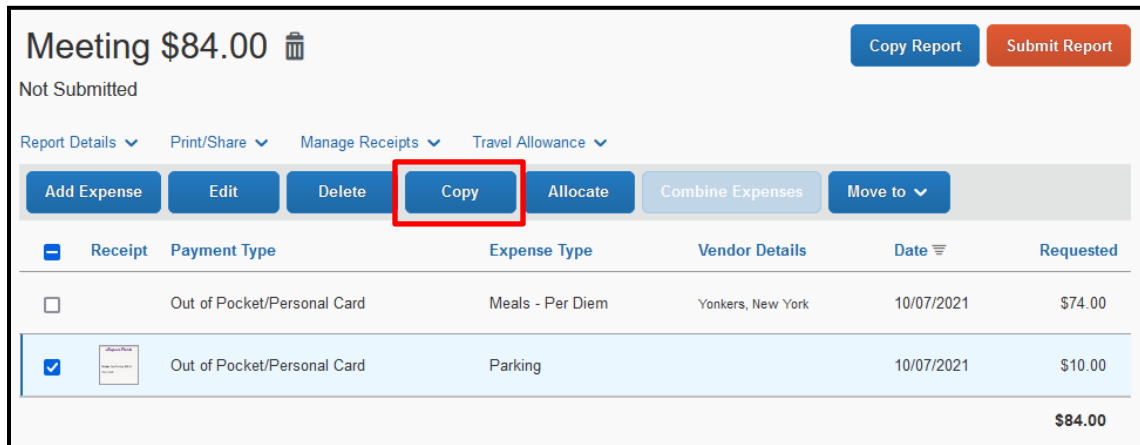
Save Expense
Save and Add Another
Cancel

## Copying an Expense

You can copy an expense and then update the expense details to quickly enter a new expense. This is especially useful for recurring business expenses.

### To copy an expense

1. With the expense report open, select the expense you want to copy.
2. Click **Copy**.



The screenshot shows an expense report titled "Meeting \$84.00" with a trash icon and "Not Submitted" status. At the top right are "Copy Report" and "Submit Report" buttons. Below the title are dropdown menus for "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". A row of action buttons includes "Add Expense", "Edit", "Delete", "Copy" (highlighted with a red box), "Allocate", "Combine Expenses", and "Move to". Below this is a table with columns: Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains two rows: one for "Meals - Per Diem" (\$74.00) and one for "Parking" (\$10.00). A total of "\$84.00" is shown at the bottom right.

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket/Personal Card	Meals - Per Diem	Yonkers, New York	10/07/2021	\$74.00
<input checked="" type="checkbox"/>	Out of Pocket/Personal Card	Parking		10/07/2021	\$10.00
					<b>\$84.00</b>

The new expense is added to the **Expenses** list. Notice the following:

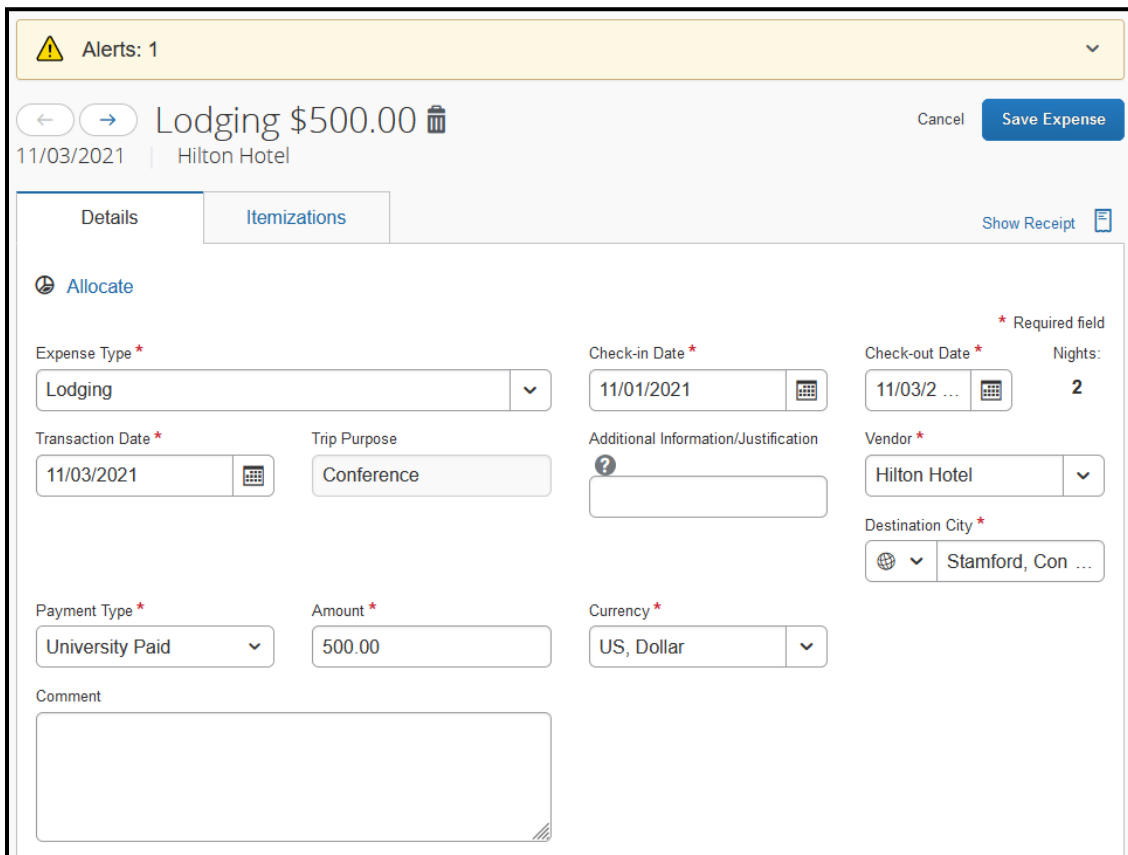
- The original expense date is advanced by a day.
- All allocations, attendees, expense-level comments, and value added tax (VAT) details from the original expense are copied to the new expense.
- Credit card information, e-receipts, mobile entry information, and travel segments (associated with travel itineraries) from the original expense are **not** copied to the new expense. This type of information is generally associated with only one expense so it is not copied to the new expense.
- If the **Payment Type** of the original expense is a credit card, then the **Payment Type** of the new expense is editable using the dropdown list.

## Itemizing Nightly Lodging Expenses


A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Lodging Itemization allows you to quickly itemize recurring room rates and taxes. You can then itemize the remaining charges on your hotel bill, and adjust for any rate changes during your stay

### To create a lodging expense

1. With the report open, click **Add Expense**, and then select the **Lodging** expense type.
2. Complete the required fields.





Alerts: 1

Lodging \$500.00 

11/03/2021 | Hilton Hotel

Cancel **Save Expense**

Details **Itemizations** Show Receipt 

 Allocate

Expense Type \* Lodging

Check-in Date \* 11/01/2021

Check-out Date \* 11/03/2021


Nights: 2

Transaction Date \* 11/03/2021

Trip Purpose Conference

Additional Information/Justification

Vendor \* Hilton Hotel

Destination City \*  Stamford, Con ...

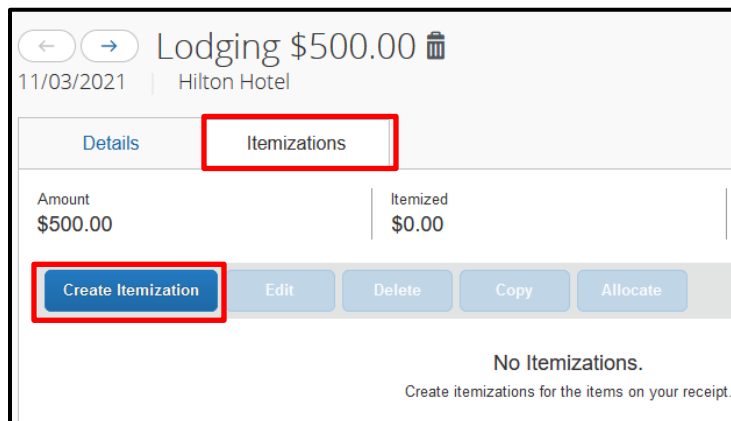
Payment Type \* University Paid


Amount \* 500.00

Currency \* US, Dollar

Comment

3. Click the **Itemizations** tab.
4. On the **Itemizations** tab, click **Create Itemization**.



Lodging \$500.00 

11/03/2021 | Hilton Hotel

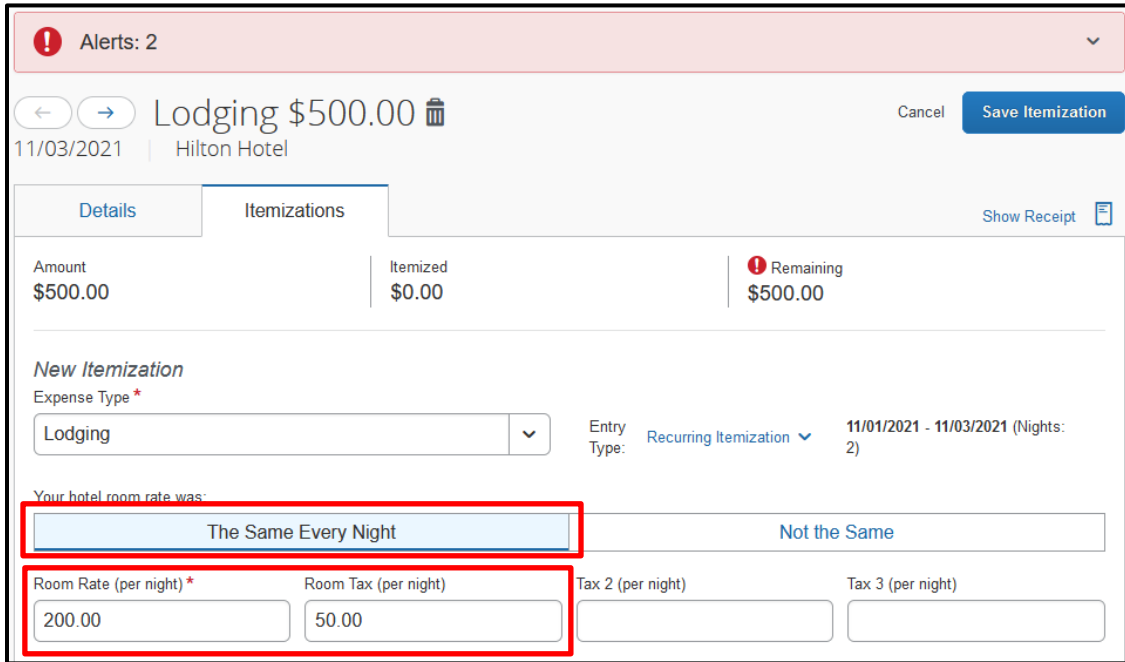
Details **Itemizations**

Amount	Itemized
\$500.00	\$0.00


**Create Itemization** Edit Delete Copy Allocate

No Itemizations.  
Create itemizations for the items on your receipt.


5. Select the **Lodging** expense type.
6. Select whether your hotel room rate was **The Same Every Night**, or **Not the Same**.
7. Enter the **Room Rate (per night)** and **Room Tax (per night)**, as applicable.



Alerts: 2

Lodging \$500.00  Cancel Save Itemization

11/03/2021 | Hilton Hotel

Details Itemizations Show Receipt 

Amount \$500.00 Itemized \$0.00 Remaining \$500.00

**New Itemization**

Expense Type \* Lodging Entry Type: Recurring Itemization 11/01/2021 - 11/03/2021 (Nights: 2)

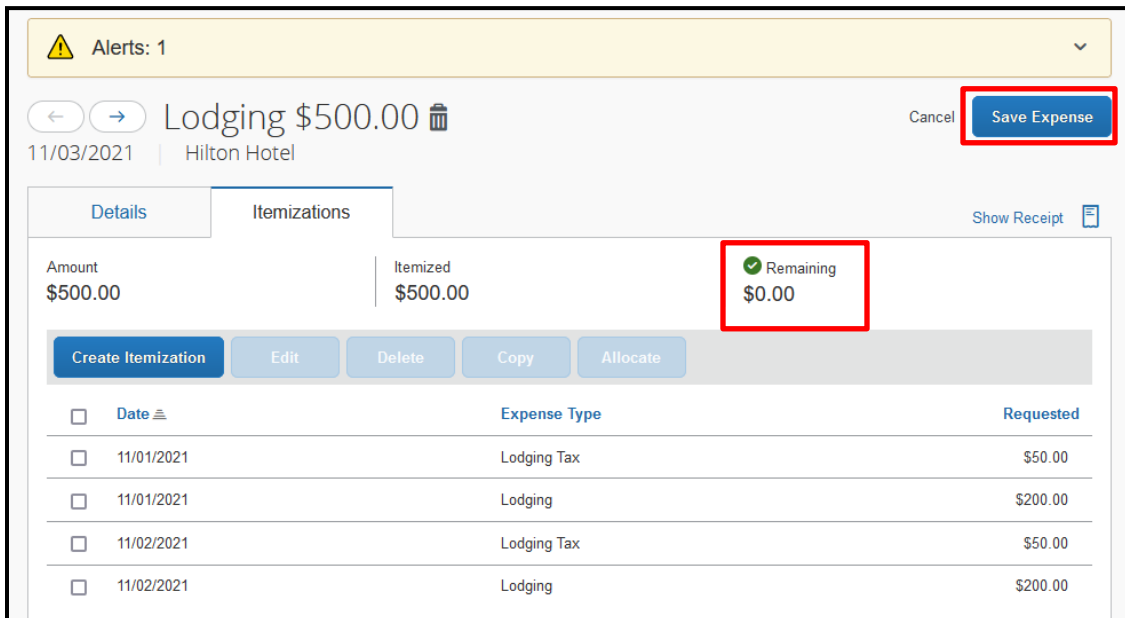
Your hotel room rate was:

**The Same Every Night** Not the Same


Room Rate (per night) \* 200.00 Room Tax (per night) 50.00 Tax 2 (per night) Tax 3 (per night)

**NOTE:** You can use the **Additional Taxes** link to enter additional taxes from your hotel bill.


8. Click **Save Itemization**.
9. If there is a remaining amount that needs to be itemized (other charges, for example, for incidentals or room service), the remaining amount is displayed in the **Remaining** field. Continue to itemize the amounts until the balance is \$0.00.



Alerts: 1

Lodging \$500.00  Cancel Save Expense

11/03/2021 | Hilton Hotel

Details Itemizations Show Receipt 

Amount \$500.00 Itemized \$500.00 Remaining \$0.00

Create Itemization Edit Delete Copy Allocate

Date	Expense Type	Requested
<input type="checkbox"/> 11/01/2021	Lodging Tax	\$50.00
<input type="checkbox"/> 11/01/2021	Lodging	\$200.00
<input type="checkbox"/> 11/02/2021	Lodging Tax	\$50.00
<input type="checkbox"/> 11/02/2021	Lodging	\$200.00

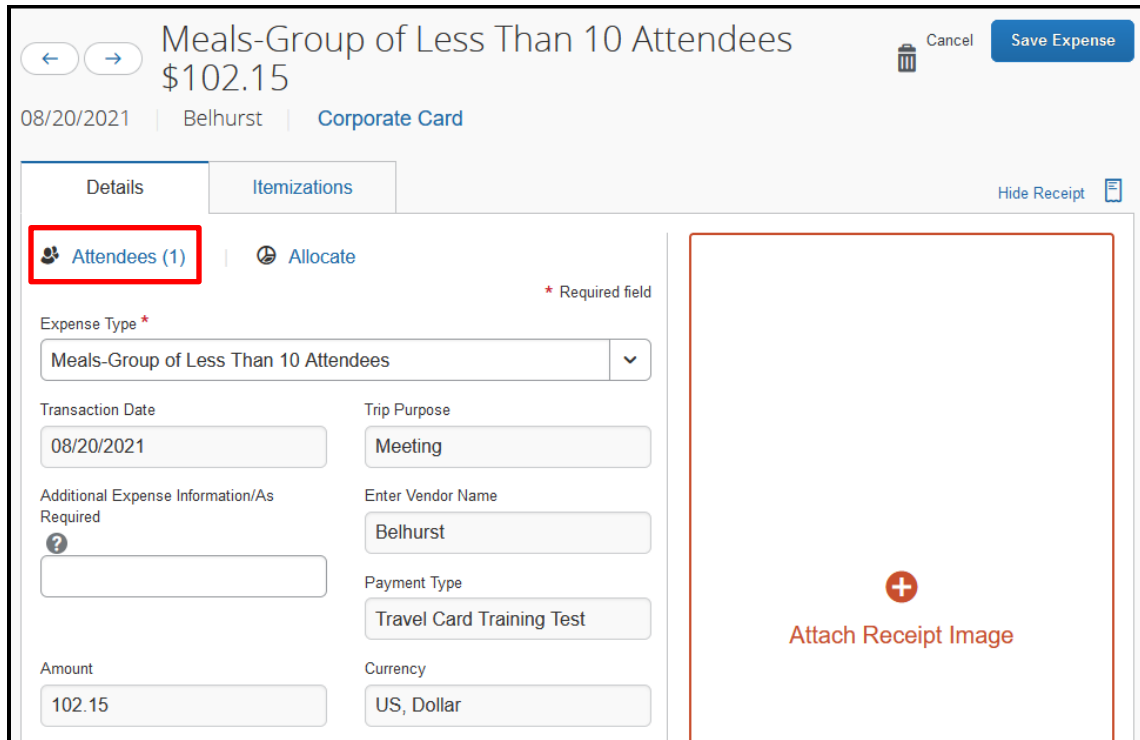
10. Click **Save Expense**.

## Adding Attendees to a Group Meal

Some expenses, such as group meal expenses, require you to add attendees.

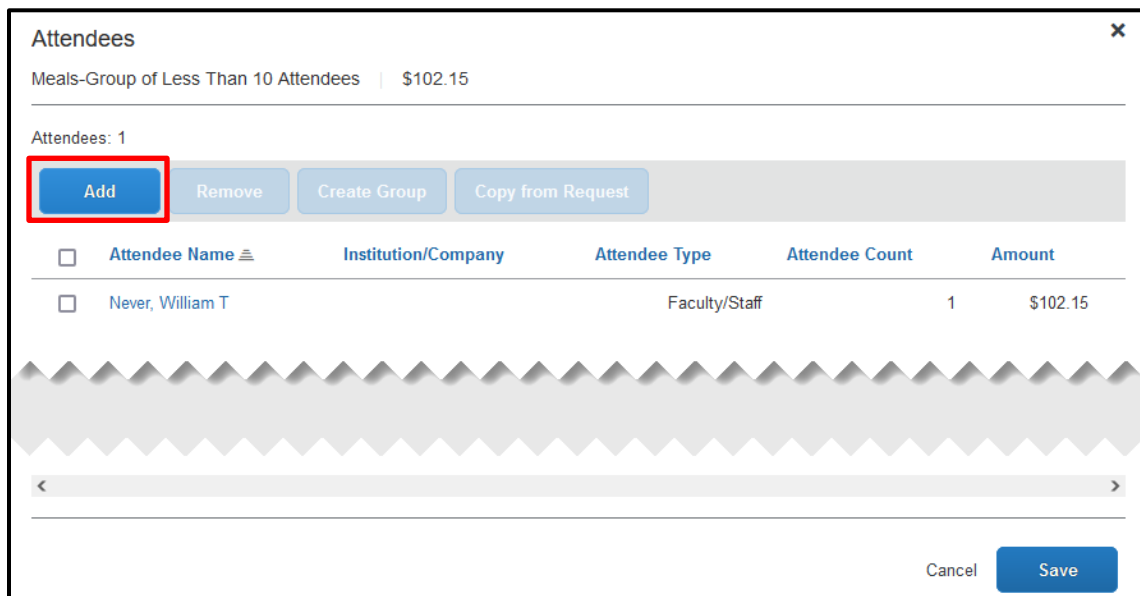
### To add attendees to a group meal

1. From the expense type screen, click **Attendees**.



The screenshot shows the expense entry interface. At the top, the title is "Meals-Group of Less Than 10 Attendees" with a value of "\$102.15". Below the title, there are tabs for "Details" and "Itemizations". A red box highlights the "Attendees (1)" button. The form includes fields for "Expense Type" (Meals-Group of Less Than 10 Attendees), "Transaction Date" (08/20/2021), "Trip Purpose" (Meeting), "Enter Vendor Name" (Belhurst), "Payment Type" (Travel Card Training Test), "Amount" (102.15), and "Currency" (US, Dollar). A large red box on the right contains a plus sign and the text "Attach Receipt Image".

2. In the **Attendees** window, click **Add**.



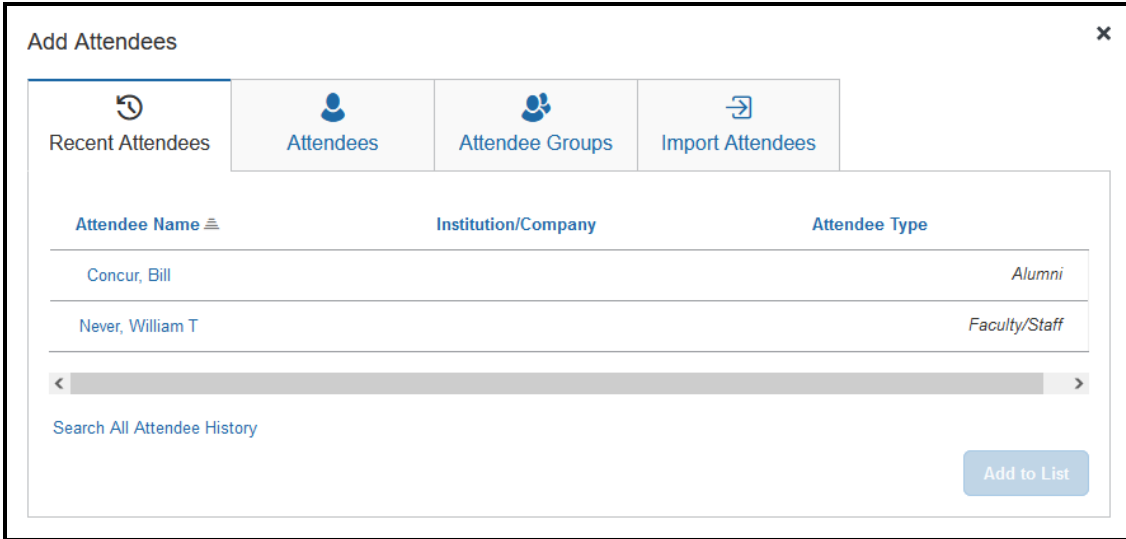
The screenshot shows the "Attendees" window. At the top, it displays "Attendees" and "Meals-Group of Less Than 10 Attendees | \$102.15". Below this, there are buttons for "Add", "Remove", "Create Group", and "Copy from Request". A red box highlights the "Add" button. Below the buttons is a table with the following data:

<input type="checkbox"/>	Attendee Name	Institution/Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Never, William T		Faculty/Staff	1	\$102.15

At the bottom right, there are "Cancel" and "Save" buttons.

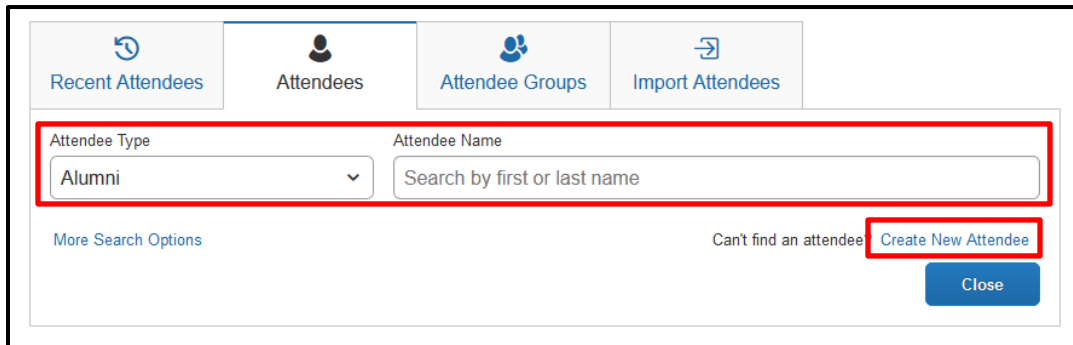
The **Add Attendees** window appears.





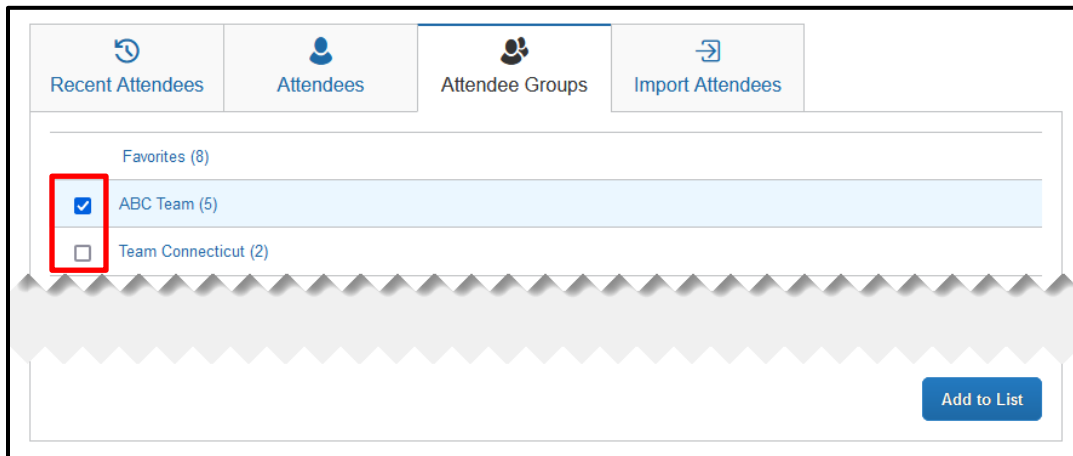
From here, you can add attendees in several ways:

- **Recent Attendees** – Select the checkbox next to the appropriate attendee who has appeared recently in your reports.
- **Attendees** – Search for attendees by **Attendee Type** and then by their name.

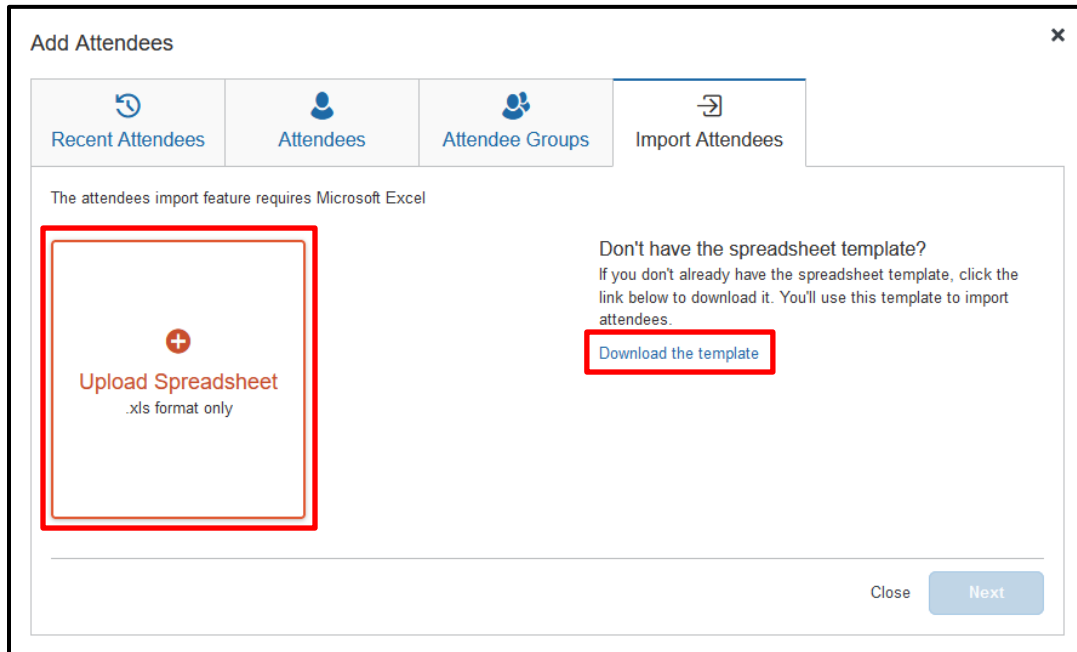


To create a new attendee, click **Create New Attendee**, complete the required fields, and then click **Create Attendee**.

- **Attendee Groups** – Select from your **Favorites** or **My Team** (these are configured in your **Profile** settings) and then click **Add to List**.



- **Import Attendees** – Upload an excel spreadsheet with the list attendees from the event. A ready-to-use template is available for download as well.



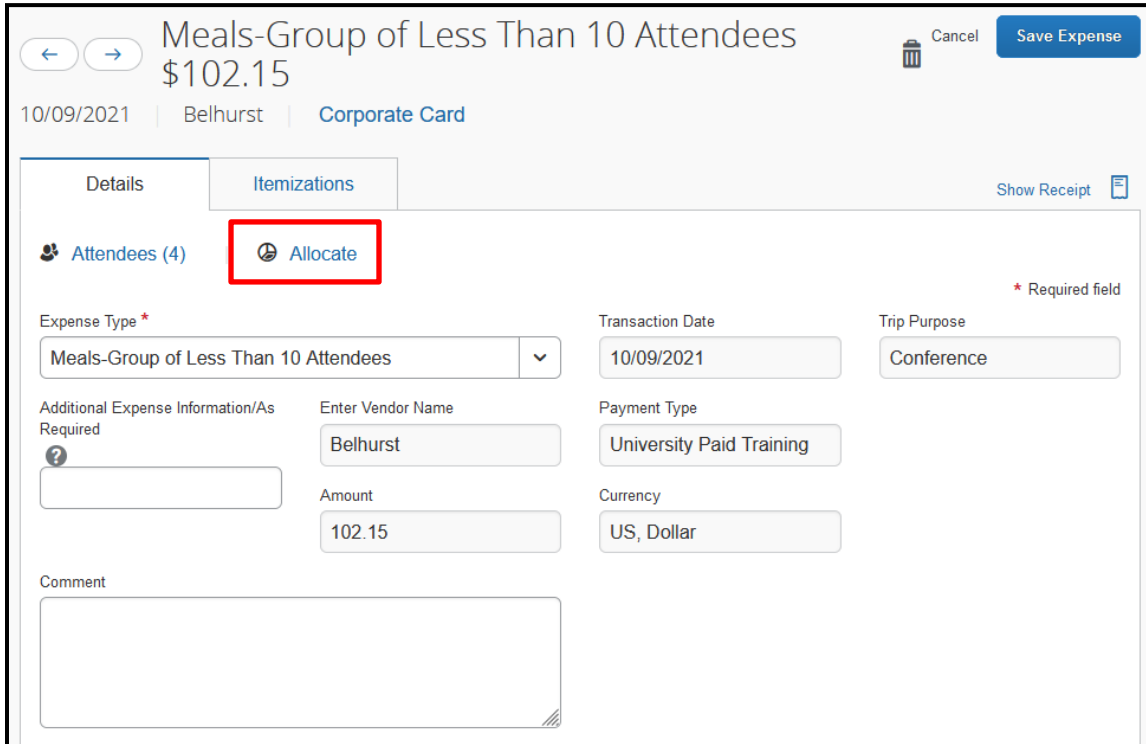
3. After adding in the appropriate attendees, click **Save**.

## Allocating Expenses

You can allocate expenses to multiple accounts or account approvers, which will be charged for those expenses. You can allocate a single expense or multiple expenses. You may only allocate to the funding source corresponding to the policy selected – State Policy or RF Policy.

### To allocate your expenses

1. With the expense open, to create or edit a *single* expense, click **Allocate**.



Meals-Group of Less Than 10 Attendees  
\$102.15

10/09/2021 | Belhurst | Corporate Card

Details | **Itemizations** | Show Receipt

Attendees (4) | **Allocate**

Expense Type \*  
Meals-Group of Less Than 10 Attendees

Transaction Date  
10/09/2021

Trip Purpose  
Conference

Additional Expense Information/As Required  
Enter Vendor Name  
Belhurst

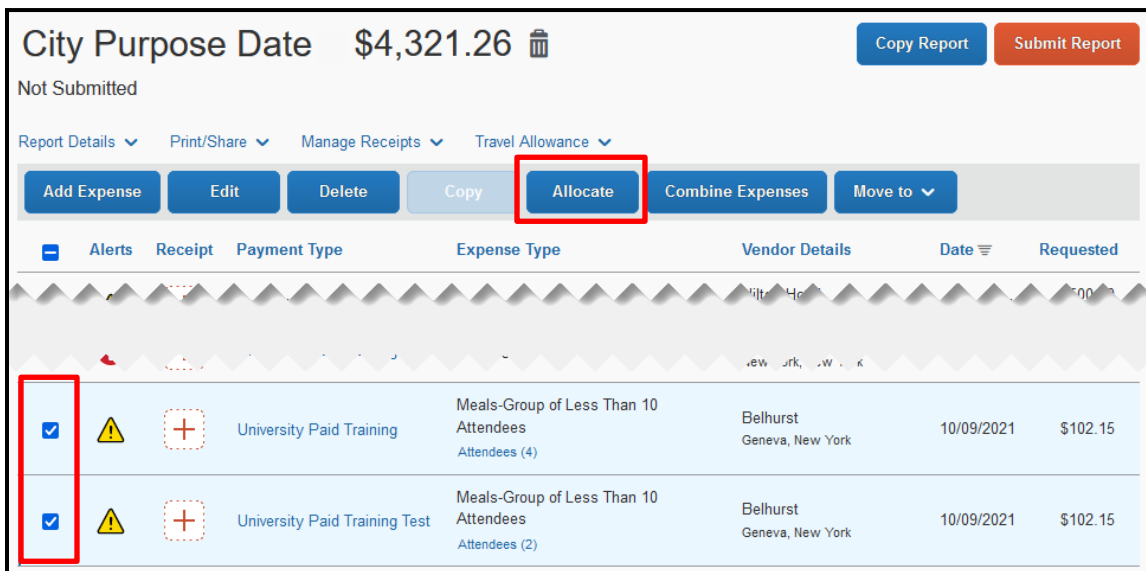
Payment Type  
University Paid Training

Amount  
102.15

Currency  
US, Dollar

Comment

2. With the report open, to allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then click **Allocate**.







City Purpose Date \$4,321.26

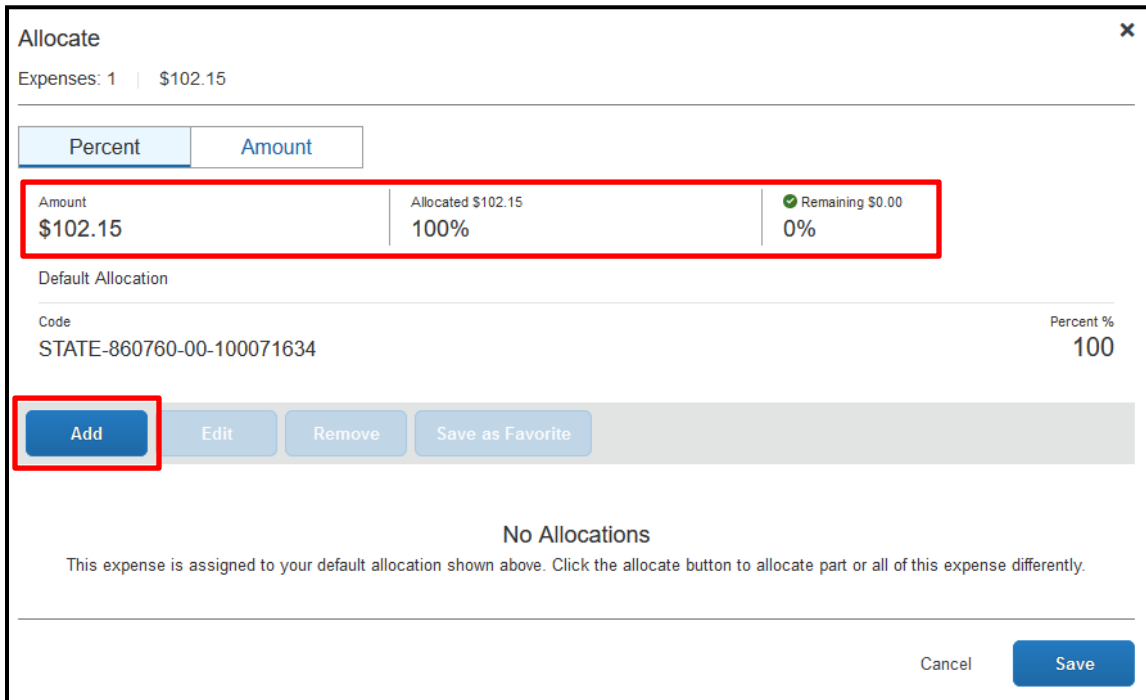
Not Submitted

Report Details | Print/Share | Manage Receipts | Travel Allowance

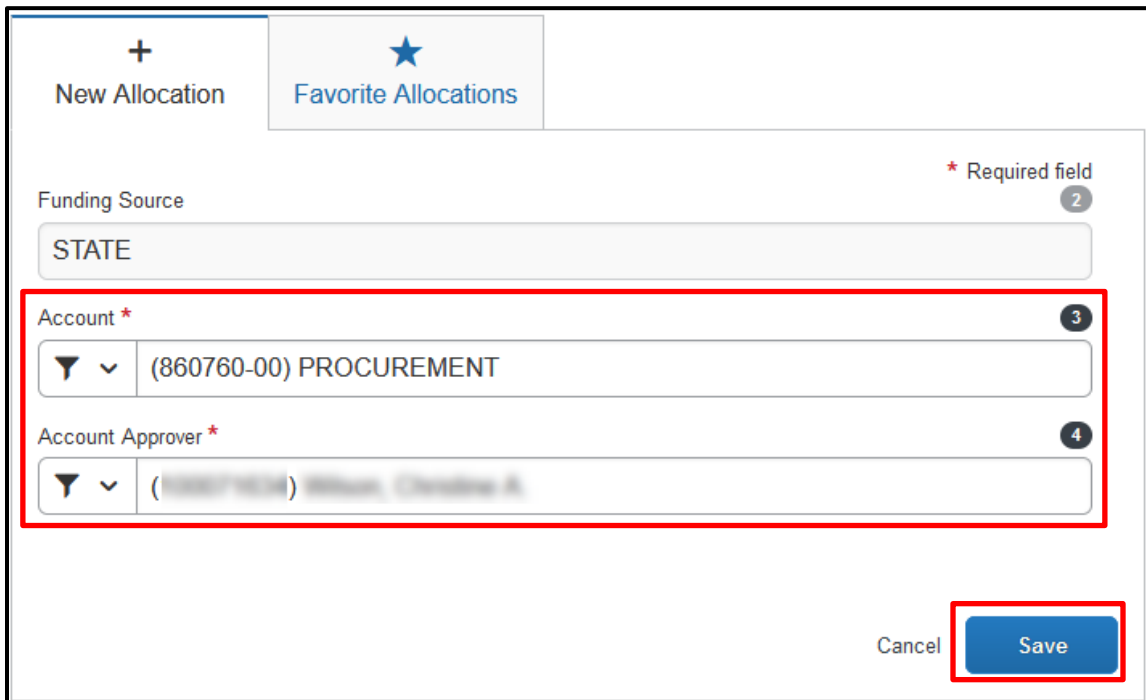
Add Expense | Edit | Delete | Copy | **Allocate** | Combine Expenses | Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			University Paid Training	Meals-Group of Less Than 10 Attendees Attendees (4)	Belhurst Geneva, New York	10/09/2021 \$102.15
<input checked="" type="checkbox"/>			University Paid Training Test	Meals-Group of Less Than 10 Attendees Attendees (2)	Belhurst Geneva, New York	10/09/2021 \$102.15

The **Allocate** window appears. The total expense **Amount**, the amount **Allocated**, and the amount **Remaining** are listed.



3. From the **Edit** dropdown list, select **Percent** or **Amount**.
4. Click **Add**.
5. Add allocations (as needed) by selecting appropriate **Accounts** and **Account Approvers**, from the New Allocation or Favorite Allocations tabs. **Save** each one.



You can adjust the amounts and percentages. The total amount must be allocated 100%, otherwise an audit rule will prevent you from submitting the report.

6. Click **Save**.

**Allocate** ✕

Expenses: 1 | \$102.15

---

Percent

Amount

Amount

**\$102.15**

Allocated \$102.15

**100%**

Remaining \$0.00

**0%**

Default Allocation

---

Code: STATE-860760-00-100071634 Percent %: 0

---

Add
Edit
Remove
Save as Favorite

<input type="checkbox"/>	Funding Source	Account	Account Approver	Code	Percent %
<input type="checkbox"/>	STATE	PROCUREMENT	William, Christine A.	STATE-860760-00-100071634	50
<input type="checkbox"/>	STATE	PROCUREMENT	Christine, Carol	STATE-860760-00-100071634	50

Cancel
**Save**

7. Click **Save Expense**. The entry for the expense now displays the Allocated link.

Meals-Group of Less Than 10 Attendees	Belhurst Geneva, New York	10/09/2021	\$102.15
Attendees (4)			<a href="#">Allocated</a>

## Converting Foreign Currency Transactions

When your travel takes you to different countries, you will need to convert foreign currency transactions to your standard reimbursement currency.

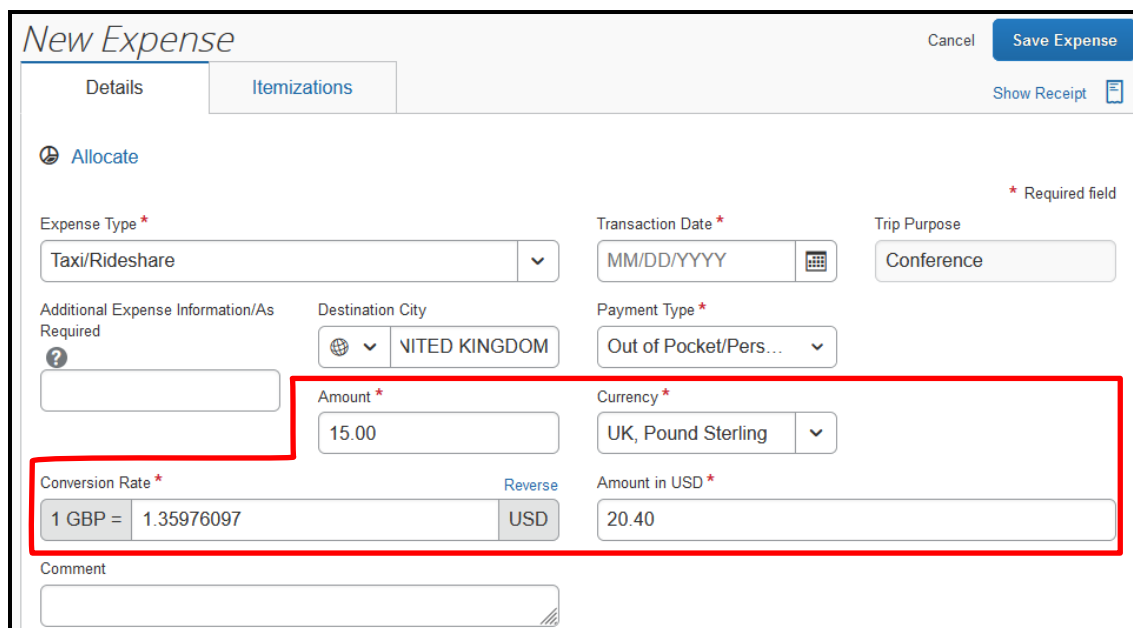
### To account for an expense incurred in another currency

1. With the report open, click **Add Expense**, and then **Create New Expense**.
2. Search for or enter the appropriate expense type.
3. Complete the required fields (indicated with a red asterisk).


Note the following:


- Select the "spend" **Currency** from the list to the right of the **Amount** field. Notice that the **Conversion Rate** field appears.
- The **Conversion Rate** is automatically populated according to the **Transaction Date** and **Currency** entries.  
Expense calculates the **Amount** in your reimbursement currency.
- Currency can be converted by multiplying by a particular rate or dividing by a different rate. To switch between multiplication of the rate to division of the rate, click **Reverse** next to the **Conversion Rate** field.

4. Complete the remaining fields as appropriate, and then click **Save Expense**.




*New Expense* Cancel **Save Expense**

Details Itemizations Show Receipt 


 **Allocate**

\* Required field

Expense Type \* Transaction Date \* MM/DD/YYYY  Trip Purpose

Taxi/Rideshare Conference

Additional Expense Information/As Required Destination City Payment Type \*

 UNITED KINGDOM Out of Pocket/Pers...

Amount \* Currency \*

15.00 UK, Pound Sterling

Conversion Rate \* Reverse Amount in USD \*

1 GBP = 1.35976097 USD 20.40

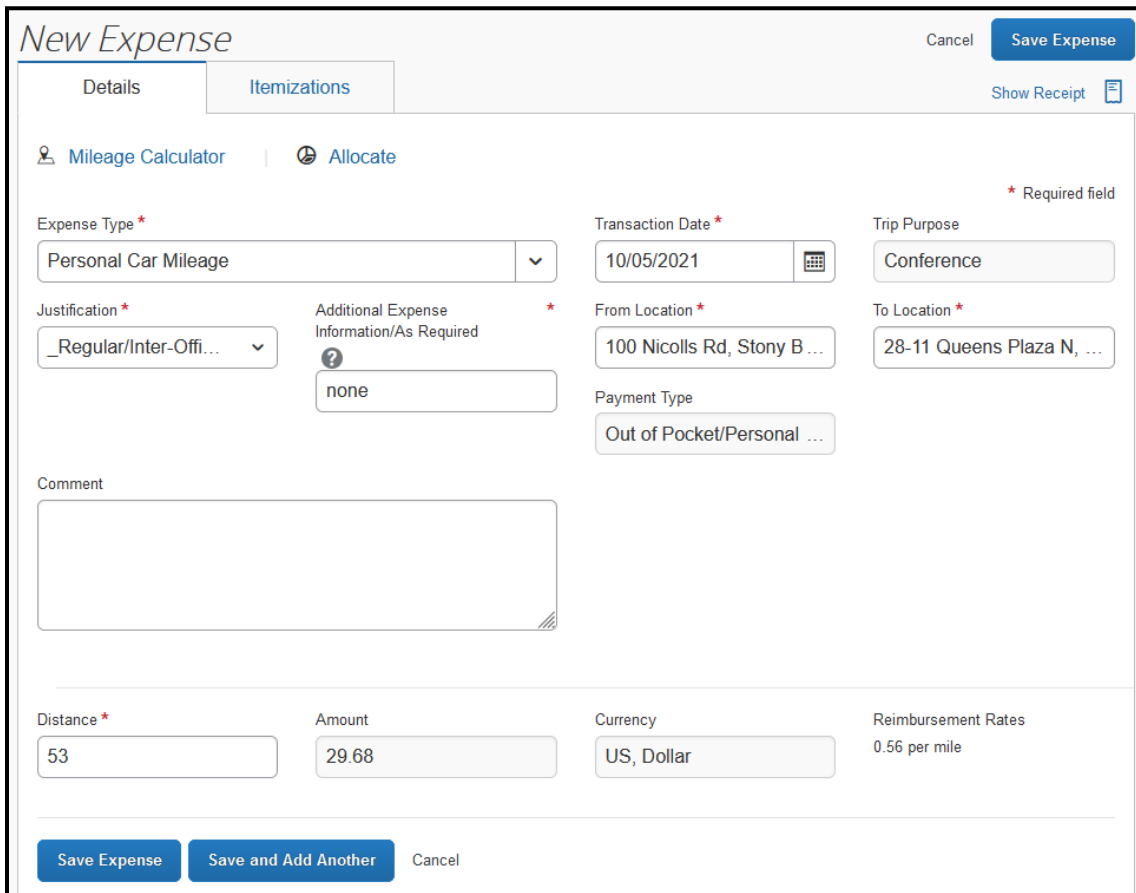
Comment

## Entering Personal Car Mileage

In the event that you use a personal vehicle for business purposes, you will need to track your car mileage in order to be reimbursed.

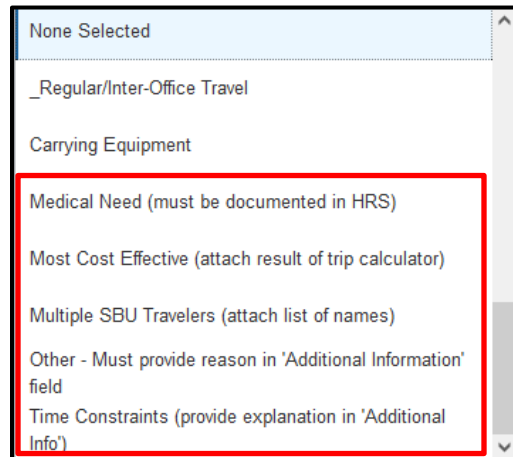
### To create a car mileage expense

1. With the expense report open, click **Add Expense**.
2. Select **Personal Car Mileage**.
3. Complete all of the required fields (indicated with a red asterisk).

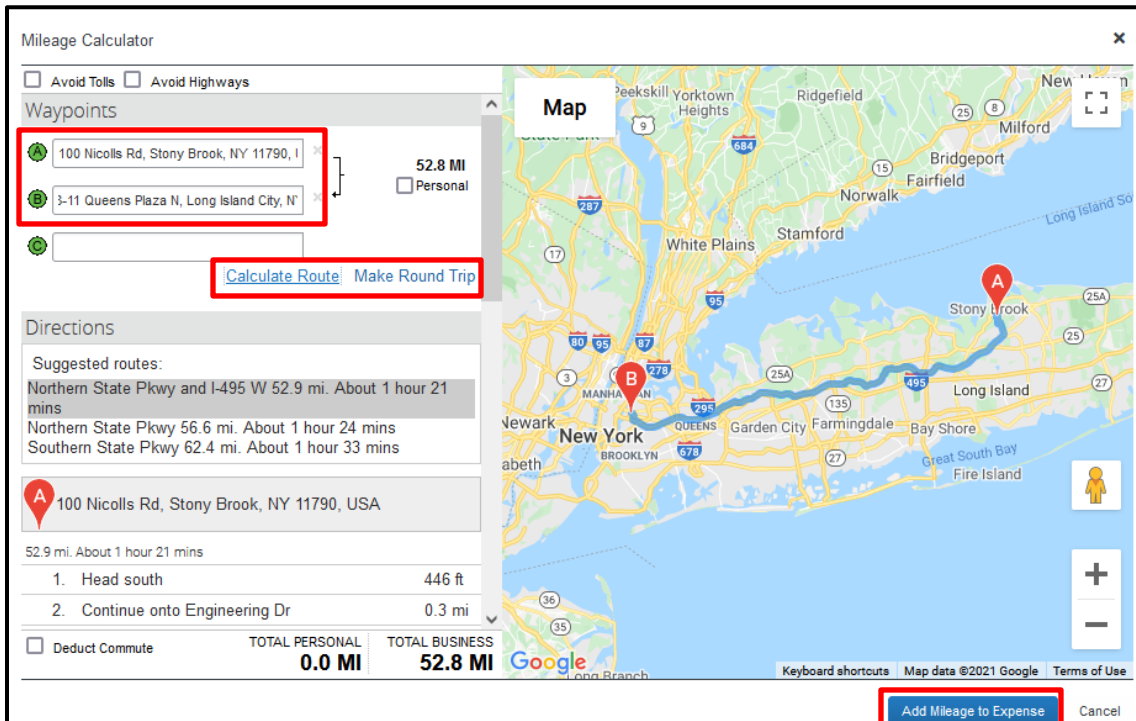


Depending on the **Justification** selected, you will need to take additional steps and/or provide an explanation in the **Additional Expense Information/As Required** field.

4. Click on the **Mileage Calculator** link.

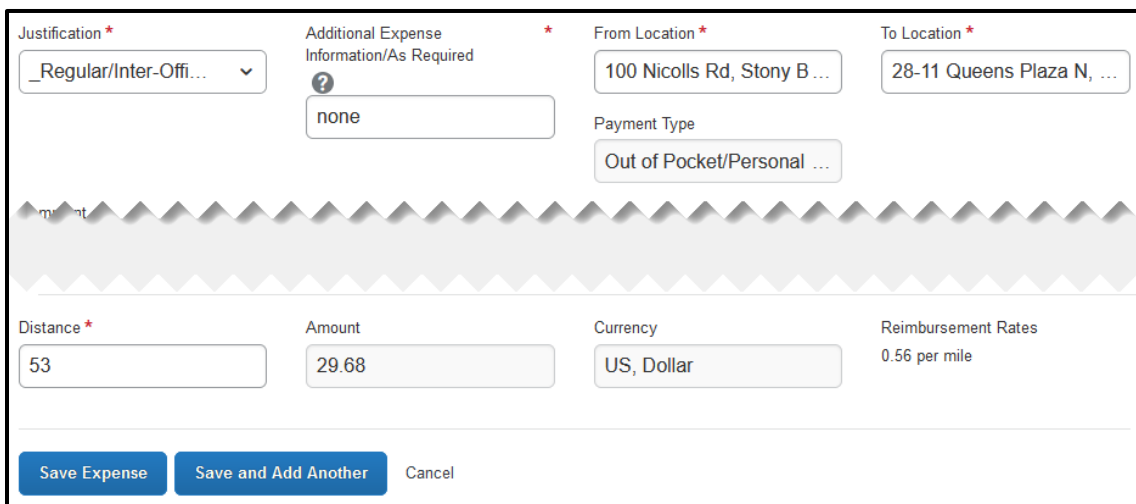



- In the Mileage Calculator window, enter the start and end addresses of your trip in the **Waypoints** fields.



You may mark certain trip legs as personal, deduct your regular (non-reimbursable) commute, or make it a round trip by selecting the appropriate checkboxes or links.

- After entering your Waypoints and defining the other parameters of your trip, click **Calculate Route**. The system will calculate the most logical path for the trip.
- Click **Add Mileage to Expense**.



- Notice the **From Location**, **To Location**, **Distance**, and **Amount** fields are updated. Click **Save Expense**.



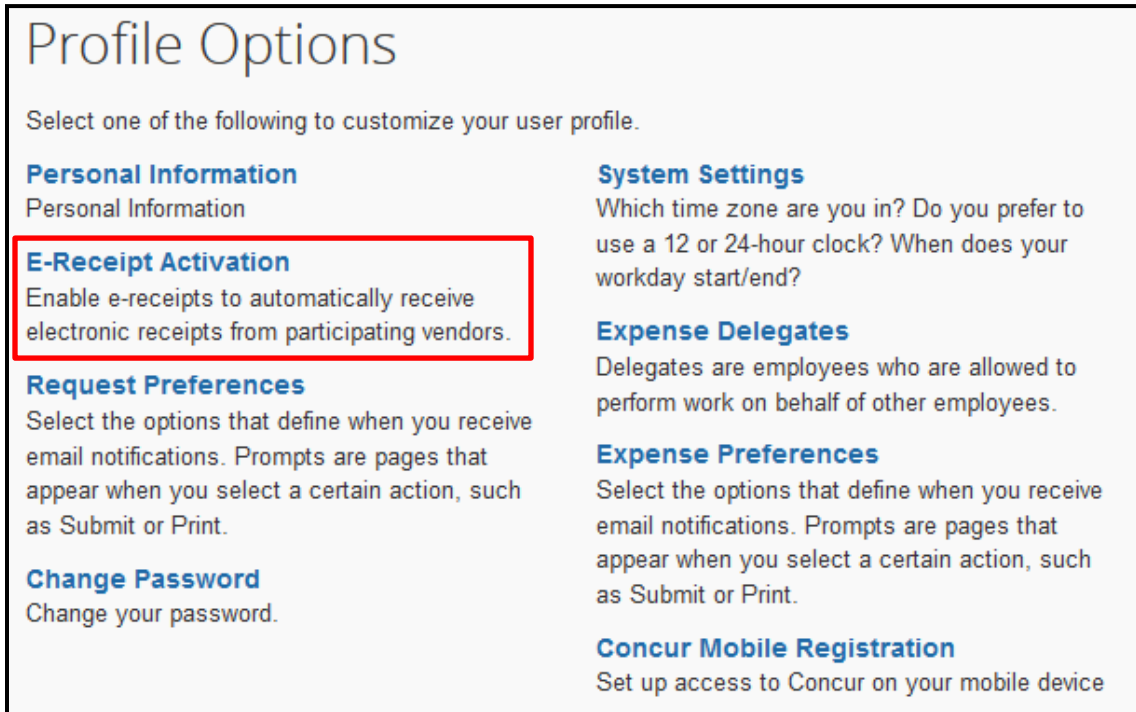
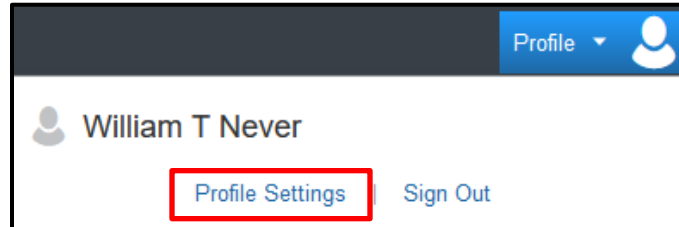
## Activating E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to SAP Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

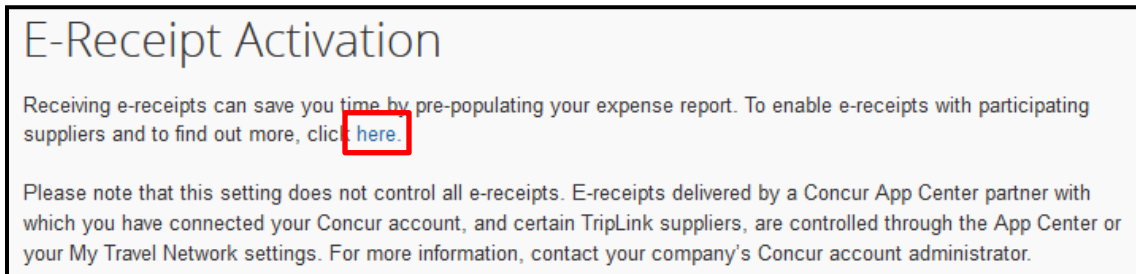
You must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data. Contact the Procurement Travel Office for more information.

### To activate e-receipts

1. Click **Profile**, and then click **Profile Settings**.
2. On the Profile Options page, click **E-Receipt Activation**. The **E-Receipt Activation and User Agreement** appears.



3. On the **E-Receipt Activation** page, click the **here** link.



The E-Receipt Activation agreement appears.

4. Read through the agreement, and then click **I Agree**.

### E-Receipt Activation ✕


Concur can enable the automatic collection of the electronic receipts and folio data ("e-receipts") generated by your transactions with participating travel suppliers ("Participating Suppliers"). Participating Suppliers in Concur Travel search results are designated with an "e-receipt enabled" label.

By clicking "I Agree" below to turn on the e-receipts functionality, you authorize Concur and its corporate affiliates to receive, transfer and use e-receipts generated by your transactions with Participating Suppliers in connection with Concur services, including air, rail, hotel, car rental, and other ground transportation suppliers, and you authorize such Participating Suppliers and their respective agents and affiliates to share such e-receipts with Concur. To retrieve e-receipts

Receipts are successfully enabled.

5. If you want to disable the E-Receipt Activation setting, on the **E-Receipt Activation** page, click the **here** link.

### E-Receipt Activation

 You have successfully enabled e-receipts with participating suppliers. You may disable this functionality at any time by accessing this page from the Profile menu.

You previously enabled Concur to obtain e-receipts for you with certain participating suppliers, but you may disable this functionality at any time. If you disable this setting, Concur will no longer request e-receipts from such suppliers. Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator.

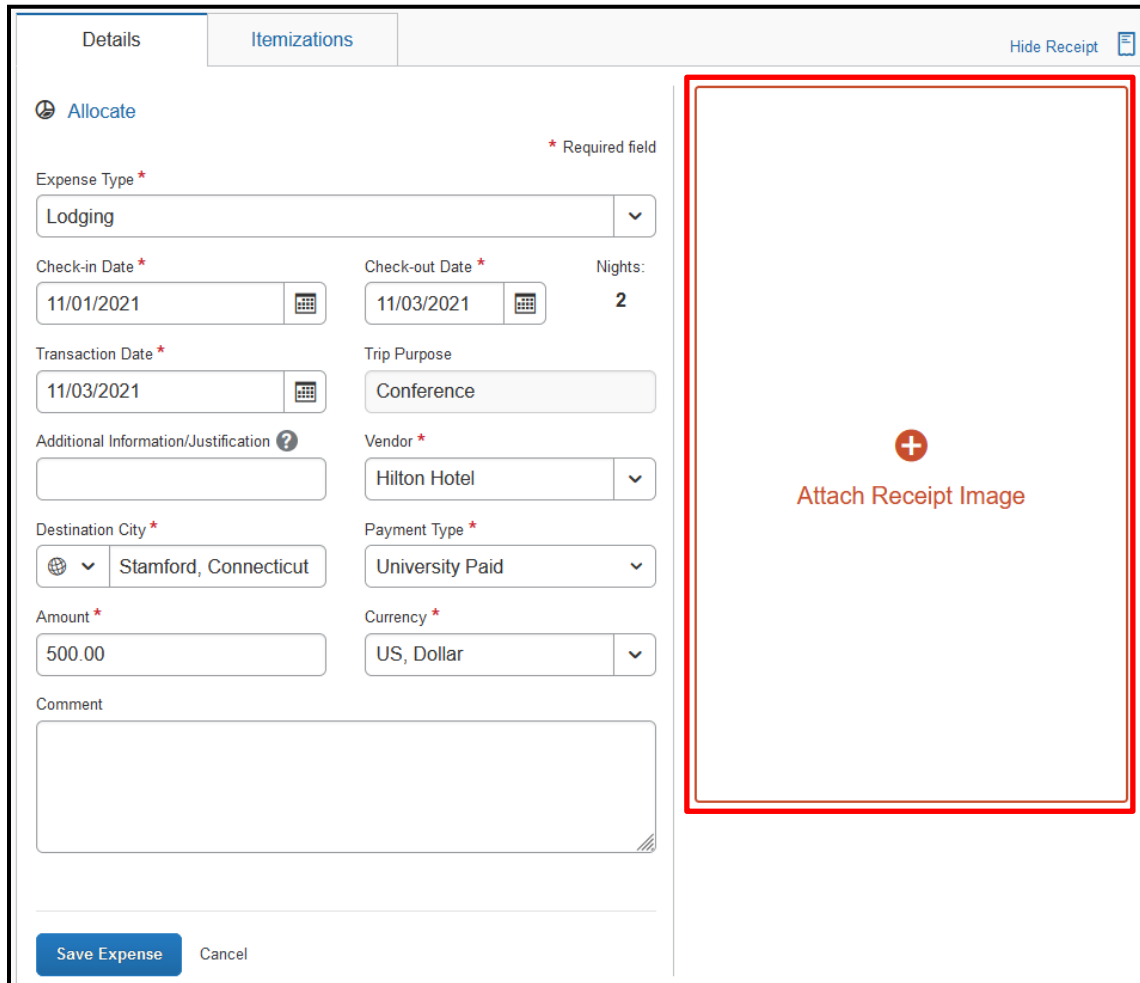
If you wish to disable this setting, click [here](#).

## Uploading Receipts using Available Receipts

Available Receipts work with the SAP Concur Imaging Service to provide receipt images that the user can either email or upload images to, and then use to attach images at the line item expense entry level (only). Images in supported format are uploaded using a SAP Concur-verified email address provided by the user during signup, and these images are then available to that user (only) for the purpose of attaching to report expense entries.

### To attach a receipt image to an expense entry using Available Receipts

1. Select an entry to open it.



The screenshot displays the SAP Concur expense entry form with the 'Details' tab selected. The form contains various fields for expense details, including Expense Type (Lodging), Check-in Date (11/01/2021), Check-out Date (11/03/2021), Transaction Date (11/03/2021), Trip Purpose (Conference), Vendor (Hilton Hotel), Destination City (Stamford, Connecticut), Payment Type (University Paid), Amount (500.00), and Currency (US, Dollar). A large red-bordered area on the right side of the form is highlighted, containing a red plus sign icon and the text 'Attach Receipt Image'. At the bottom of the form, there are 'Save Expense' and 'Cancel' buttons.

2. On the Details tab, click **Attach Receipt Image**.

3. Select the receipt image you want to attach, and then click **Attach**.


### Attach Receipt ✕

Select a receipt image or reuse one from this report:

Available Receipts
Receipts in Report

+  
Upload Receipt Image  
5MB limit per file

**parking.png**  
Uploaded: 10/12/2021 9:12 AM



Attach
View

**American Airlines.PNG**  
Uploaded: 9/21/2021 2:53 PM


Your trip receipt

For flight: American Flight 00000000000000000000

<b>Receipt #:</b> 000000	8/18/2021
<b>Amount:</b> \$100.00	\$100.00
<b>Tax:</b> \$0.00	\$0.00
<b>Total:</b> \$100.00	\$100.00


Attach
View

**Sample Receipt1.png**  
Uploaded: 9/9/2021 3:49 PM




Attach
View

**Sample Receipt3.png**  
Uploaded: 9/9/2021 3:23 PM



Attach
View

**Sample Test Receipt.png**  
Uploaded: 9/9/2021 3:16 PM



Attach
View

Close

4. The receipt image is attached to the expense entry and displays on the right side of the screen. Click **Save Expense**.

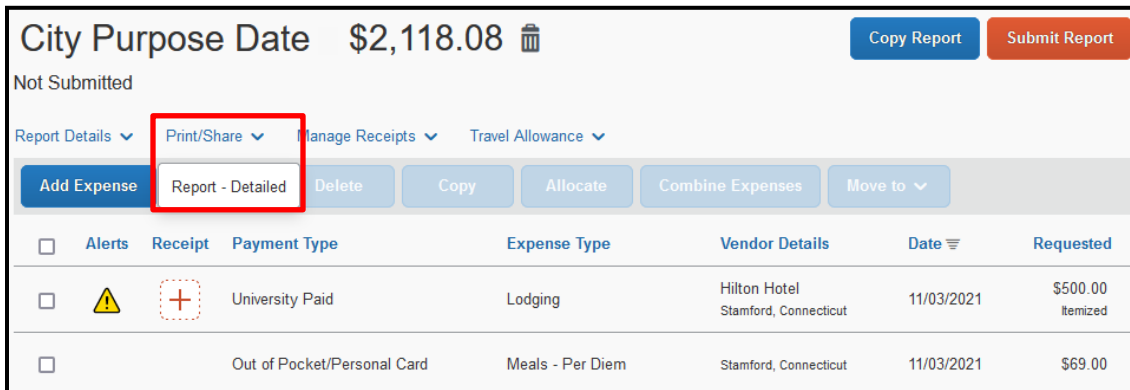
**NOTE:** You can **Detach** or **Append** the image from the receipt pane.

## Printing and Submitting an Expense Report

When you complete your expense report, you can print it to save a hard copy for your records, if you wish.

### To preview and print the expense report

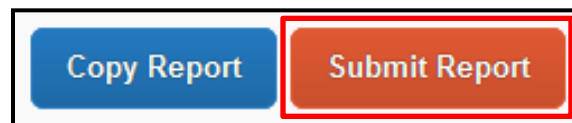
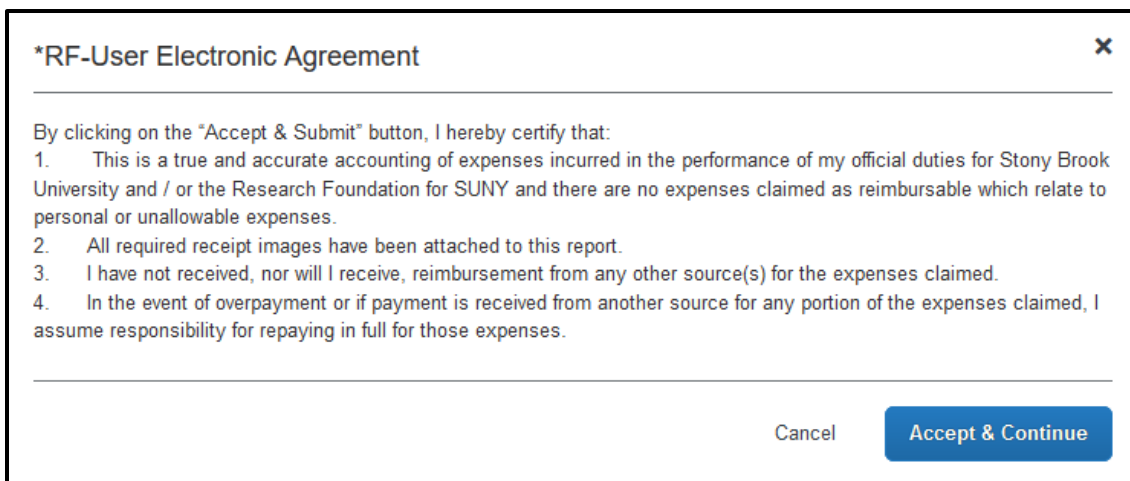
1. On the expense report page, click **Print/Share**.
2. Select **Report – Detailed**.



3. Click **Print**. This will provide you with a document that includes all of the report-level information as well as a summary of your expense report.

### To submit your expense report

1. On the expense report page, click **Submit Report**. The **Report Totals** window appears.
2. Review the information for accuracy, and then click **Submit Report**.
3. The Final Review window appears. Review the User Electronic Agreement, and then click **Accept & Continue**.

4. Review the Report Totals, then click **Submit Report**.

### Report Totals ✕

✔ Success! You have cleared all alerts on this report.

<p><b>Company Pays</b> \$56.00 Employee</p>	<p><b>Employee Pays</b> \$0.00 Company</p>
---	--

<p>Amount Total: \$56.00</p> <hr/> <p>Requested Amount: \$56.00</p>	<p>Due Employee: \$56.00</p> <hr/> <p>Total Paid By Company: \$56.00</p>	<p>Owed Company: \$0.00</p> <hr/> <p>Total Owed By Employee: \$0.00</p>
---	--	---

Cancel Submit Report

- In the Report Status window, click **Close**

### Report Status ✕

✔ Report Submitted

Date Event Location | \$56.00

Close

If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact the Travel Office.

**SUBMITTED**
10/15/2021

**City Purpose Date**

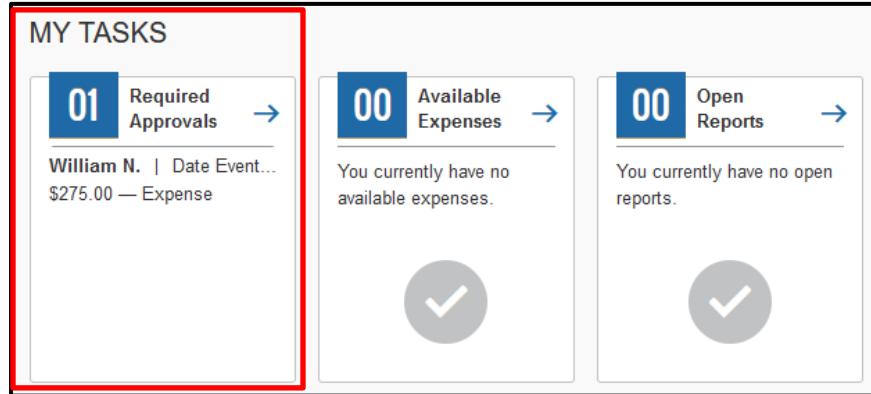
\$56.00

Pending External Validation

## Reviewing and Approving an Expense Report

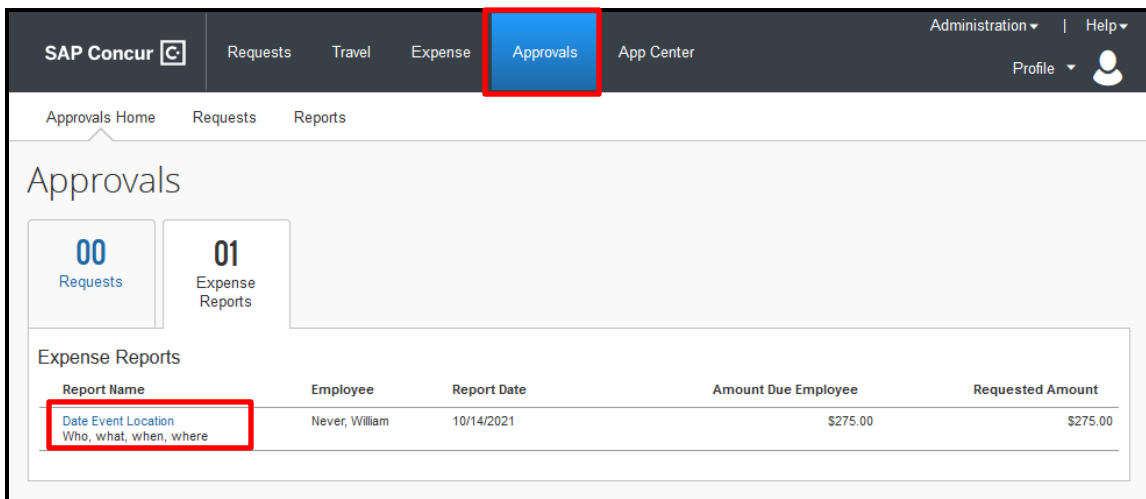
As an approver, you will need to review submitted reports and approve them for reimbursement.

On the SAP Concur homepage, in the **My Tasks** section, you can view a list of reports waiting for your approval.



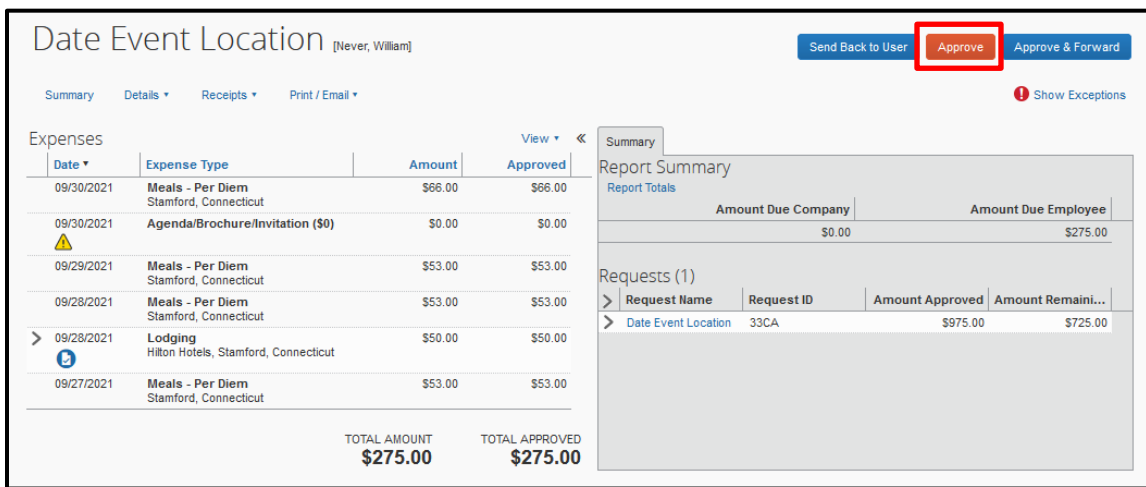
### To review and approve an expense report

1. On the SAP Concur homepage, click the **Approvals** tab. The **Approvals** page appears.



Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Date Event Location Who, what, when, where	Never, William	10/14/2021	\$275.00	\$275.00

2. Select the report you wish to review.
3. Review the report details.



Date	Expense Type	Amount	Approved
09/30/2021	Meals - Per Diem Stamford, Connecticut	\$66.00	\$66.00
09/30/2021	Agenda/Brochure/Invitation (\$0)	\$0.00	\$0.00
09/29/2021	Meals - Per Diem Stamford, Connecticut	\$53.00	\$53.00
09/28/2021	Meals - Per Diem Stamford, Connecticut	\$53.00	\$53.00
09/28/2021	Lodging Hilton Hotels, Stamford, Connecticut	\$50.00	\$50.00
09/27/2021	Meals - Per Diem Stamford, Connecticut	\$53.00	\$53.00
		<b>TOTAL AMOUNT</b>	<b>TOTAL APPROVED</b>
		<b>\$275.00</b>	<b>\$275.00</b>

4. If the report is complete and correct, click **Approve**.

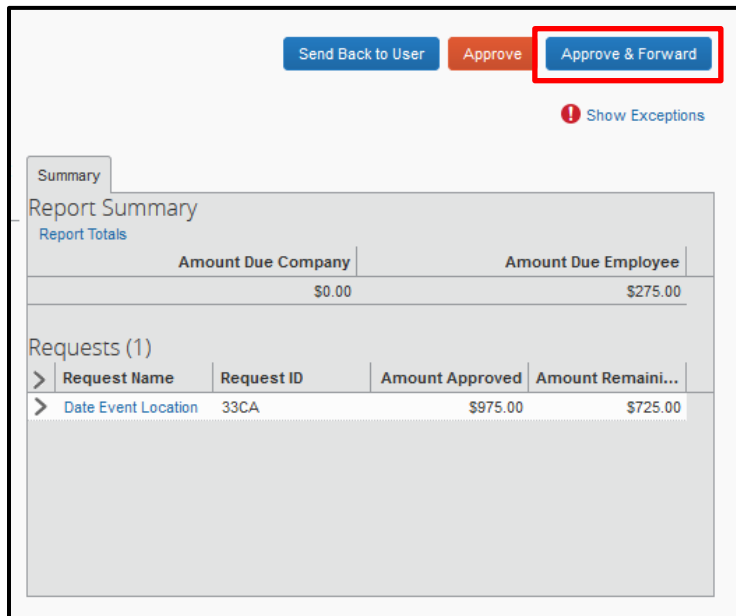


## Adding an Additional Review Step

As an approver, you may need to forward an expense report to additional approvers if, for example, you need an additional person to review and approve this report.

### To approve and forward a report

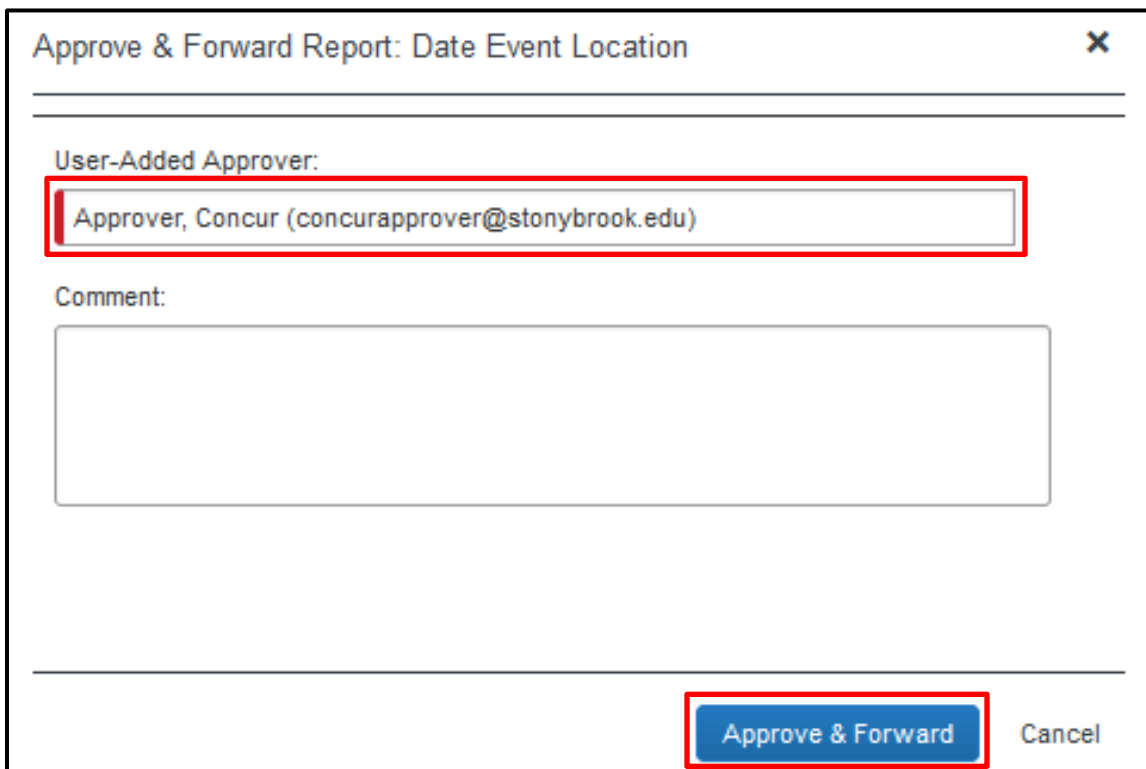
1. On the SAP Concur home page, click the **Approvals** tab. The **Approvals** page appears.
2. Select the report you wish to review.
3. Review the report details.
4. If the report is correct, click **Approve & Forward**.
5. Search for and select the appropriate approver in the **User-Added Approver** field.



The screenshot shows the 'Report Summary' page in SAP Concur. At the top right, there are three buttons: 'Send Back to User', 'Approve', and 'Approve & Forward'. The 'Approve & Forward' button is highlighted with a red box. Below the buttons is a 'Show Exceptions' link. The main content area is divided into 'Report Summary' and 'Requests (1)'. The 'Report Summary' section includes a table for 'Report Totals' with columns for 'Amount Due Company' and 'Amount Due Employee'. The 'Requests (1)' section includes a table with columns for 'Request Name', 'Request ID', 'Amount Approved', and 'Amount Remaini...'. The 'Approve & Forward' button is highlighted with a red box.

Report Totals	
Amount Due Company	Amount Due Employee
\$0.00	\$275.00

Requests (1)			
Request Name	Request ID	Amount Approved	Amount Remaini...
Date Event Location	33CA	\$975.00	\$725.00



The screenshot shows the 'Approve & Forward Report: Date Event Location' dialog box. The title bar includes a close button (X). The main content area is divided into 'User-Added Approver:' and 'Comment:'. The 'User-Added Approver:' field contains the text 'Approver, Concur (concurapprover@stonybrook.edu)' and is highlighted with a red box. The 'Comment:' field is an empty text area. At the bottom right, there are two buttons: 'Approve & Forward' and 'Cancel'. The 'Approve & Forward' button is highlighted with a red box.

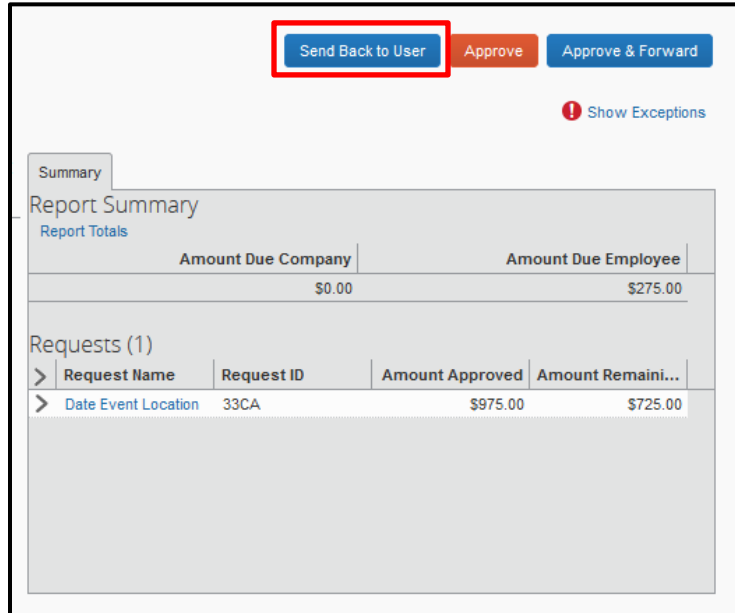
6. Click **Approve & Forward** to approve the expense report and then send it on to the next approver.

## Sending Back an Expense Report

As an approver, you are required to send back an expense report to your employee for correction if you find errors in the report or if it violates policy in some way.

### To return an expense report to an employee for correction

1. On the SAP Concur home page, click the **Approvals** tab. The **Approvals** page appears.
2. Select the report you wish to review.
3. Review the report details.
4. If the report is incorrect or violates policy, click **Send Back to User**.
5. In the Send Back Report window, enter a **Comment** that explains why the report is being returned and the corrective action the employee should take before resubmitting the report for review and approval.

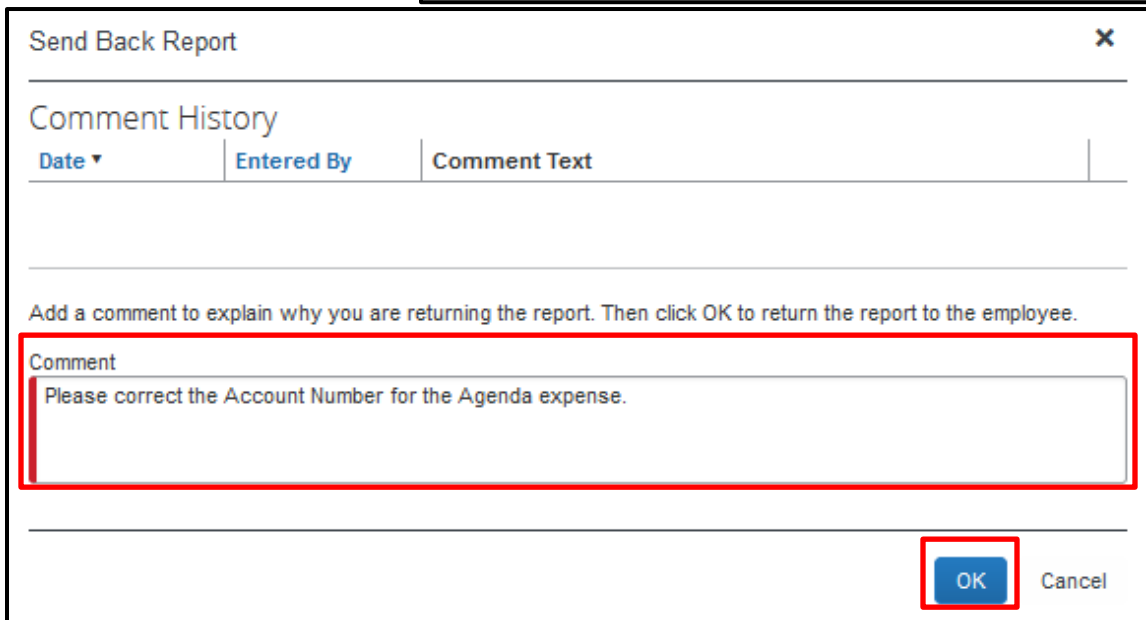


The screenshot shows the SAP Concur Approvals interface. At the top, there are three buttons: 'Send Back to User' (highlighted with a red box), 'Approve', and 'Approve & Forward'. Below the buttons is a 'Show Exceptions' link with a red exclamation mark icon. The main content area is titled 'Report Summary' and includes a 'Report Totals' table and a 'Requests (1)' table.

Report Totals	
Amount Due Company	Amount Due Employee
\$0.00	\$275.00

Requests (1)				
>	Request Name	Request ID	Amount Approved	Amount Remaini...
>	Date Event Location	33CA	\$975.00	\$725.00



The screenshot shows the 'Send Back Report' dialog box. It has a title bar with a close button (X). Below the title bar is a 'Comment History' section with columns for 'Date', 'Entered By', and 'Comment Text'. Below this is a text area with the instruction: 'Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.' A text input field is highlighted with a red box and contains the text: 'Please correct the Account Number for the Agenda expense.' At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.

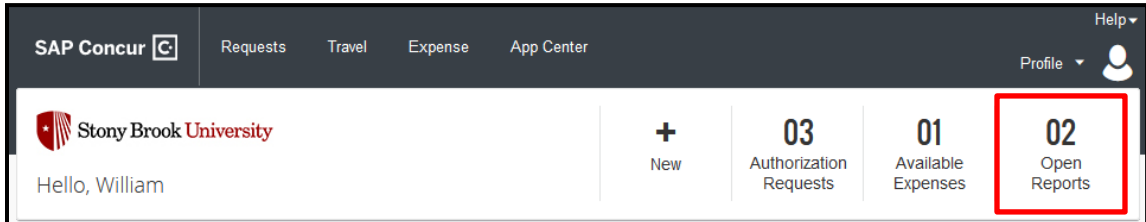
6. Click **OK** to return the report.

## Correcting and Resubmitting an Expense Report

Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you and the corrective actions you should take before resubmitting the report.

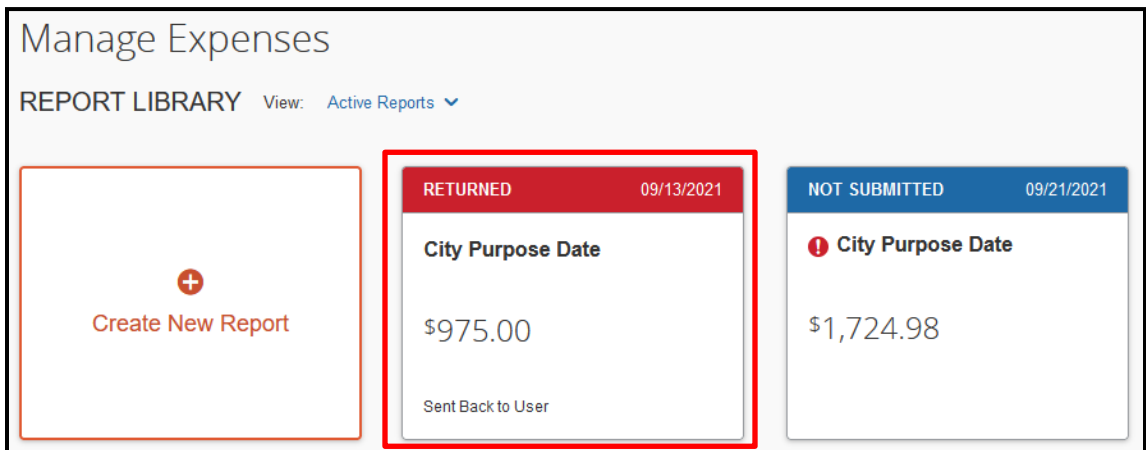
### To correct and resubmit an expense report

1. On the SAP Concur home page, in the Quick Task Bar, click the **Open Reports** task.



The report appears with a status of **Returned** in the Report Library.

2. Click on the **Returned** report tile to open the report.



3. Review your approver's comments and make the requested changes.
4. After the report is corrected, click **Submit Report** to resend the report to your approver for review.