Stony Brook Foundation Concur International Request QuickStart Guide

SAP Concur

Technologies

April 1, 2024

Proprietary Statement

These documents contain proprietary information and data that is the exclusive property of SAP Concur Technologies, Inc., Bellevue, Washington, and its affiliated companies (collectively, “SAP Concur”). If you are an active SAP Concur client, you do not need written consent to modify this document for your internal business needs. If you are *not* an active SAP Concur client, no part of this document can be used, reproduced, transmitted, stored in a retrievable system, translated into any language, or otherwise used in any form or by any means, electronic or mechanical, for any purpose, without the prior written consent of SAP Concur Technologies, Inc.

Information contained in these documents applies to the following products in effect at the time of this document's publication, including but not limited to:

- Travel & Expense
- Invoice
- Expense
- Travel
- Request
- Risk Messaging
- SAP Concur for Mobile

The above products and the information contained in these documents are subject to change without notice. Accordingly, SAP Concur disclaims any warranties, express or implied, with respect to the information contained in these documents, and assumes no liability for damages incurred directly or indirectly from any error, omission, or discrepancy between the above products and the information contained in these documents.

© 2004 – 2020 SAP Concur. All rights reserved.

SAP Concur® is a trademark of SAP Concur Technologies, Inc. All other company and product names are the property of their respective owners.

Published by SAP Concur Technologies, Inc.
601 108th Avenue, NE, Suite 1000
Bellevue, WA 98004

Table of Contents

Proprietary Statement 2

Important Note for Users 4

Signing in to SAP Concur 5

Creating an International Travel Request 6

Creating an Expense Report from an Approved Request 9

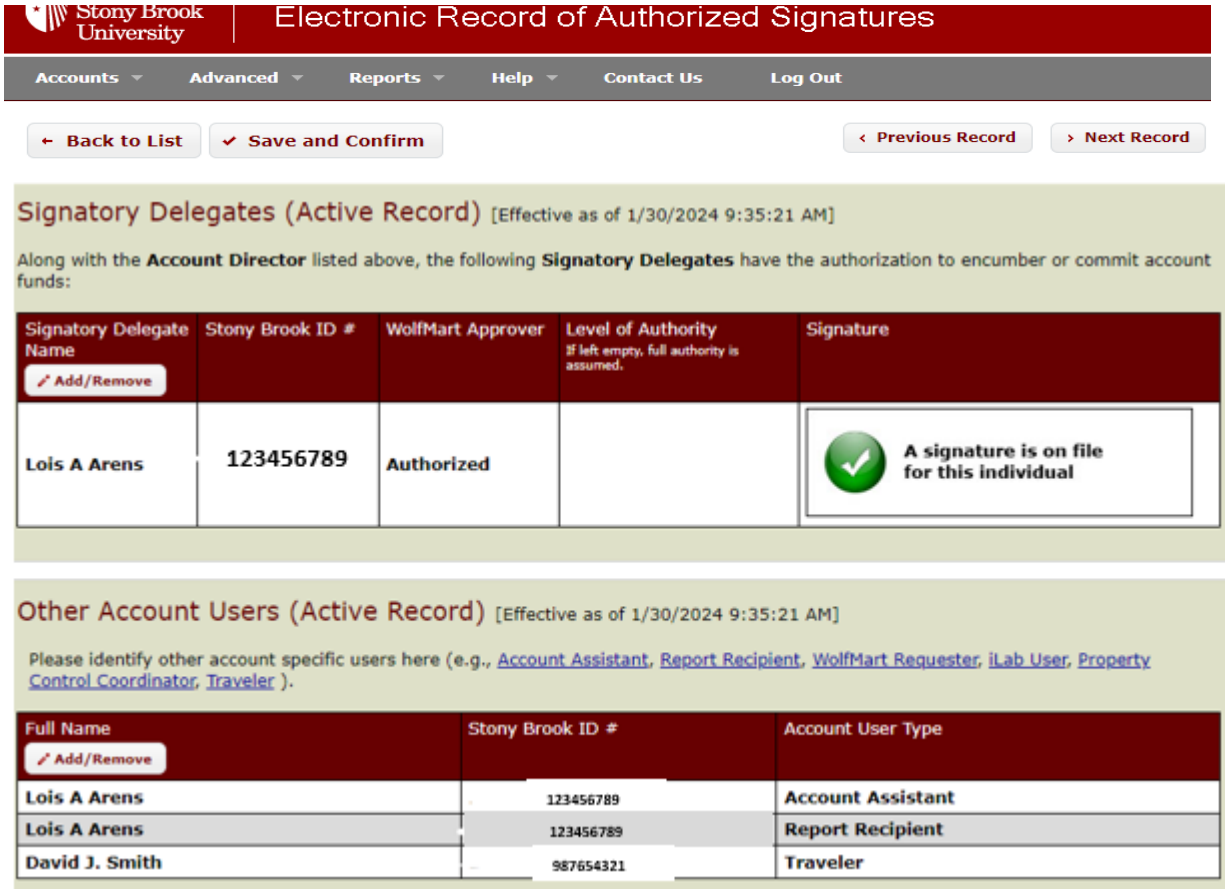
Approving Requests (Supervisors and Account Managers) 11

Closing a Request 15

Important Note for Users

In order to submit international travel requests through CONCUR, employees must be set up as either an ***account director, signatory delegate or a traveler*** in the E-RAS System for your department's SBF account.

The Account Director and Account Assistant can add someone as a Traveler in ERAS to their respective department account.



Stony Brook University | Electronic Record of Authorized Signatures

Accounts | Advanced | Reports | Help | Contact Us | Log Out

← Back to List | ✔ Save and Confirm | ‹ Previous Record | › Next Record

Signatory Delegates (Active Record) [Effective as of 1/30/2024 9:35:21 AM]

Along with the **Account Director** listed above, the following **Signatory Delegates** have the authorization to encumber or commit account funds:

Signatory Delegate Name (Add/Remove)	Stony Brook ID #	WolfMart Approver	Level of Authority (If left empty, full authority is assumed.)	Signature
Lois A Arens	123456789	Authorized		A signature is on file for this individual

Other Account Users (Active Record) [Effective as of 1/30/2024 9:35:21 AM]

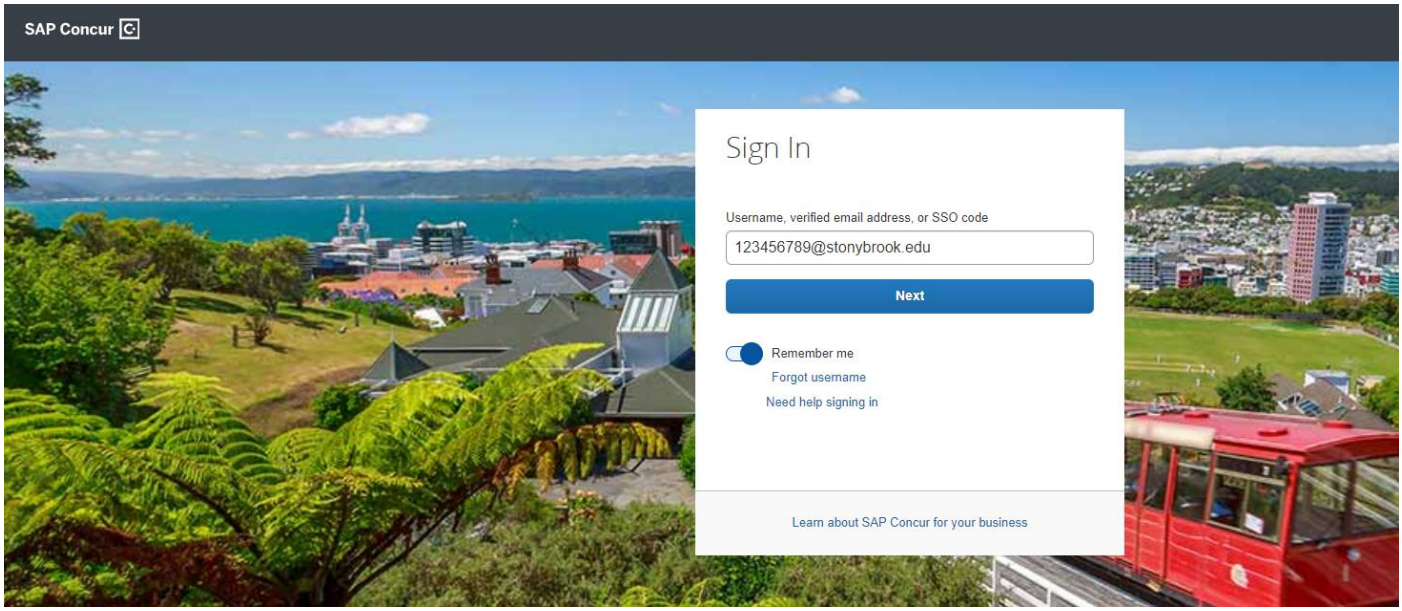
Please identify other account specific users here (e.g., Account Assistant, Report Recipient, WolfMart Requester, iLab User, Property Control Coordinator, Traveler).

Full Name (Add/Remove)	Stony Brook ID #	Account User Type
Lois A Arens	123456789	Account Assistant
Lois A Arens	123456789	Report Recipient
David J. Smith	987654321	Traveler

Signing 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 username, 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:

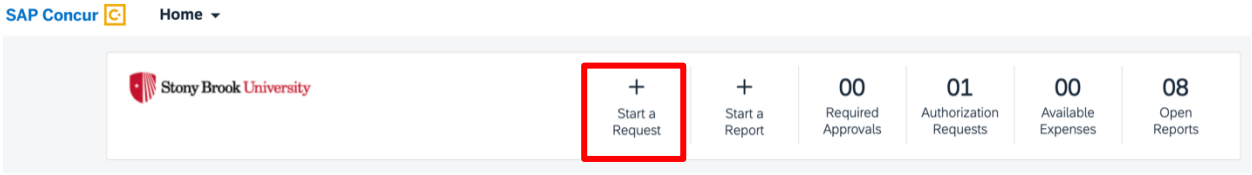
- Your password is case sensitive.
- If you are not unable to log in with your NetID, please visit: https://it.stonybrook.edu/services/netid for assistance.

Creating an International Travel Request

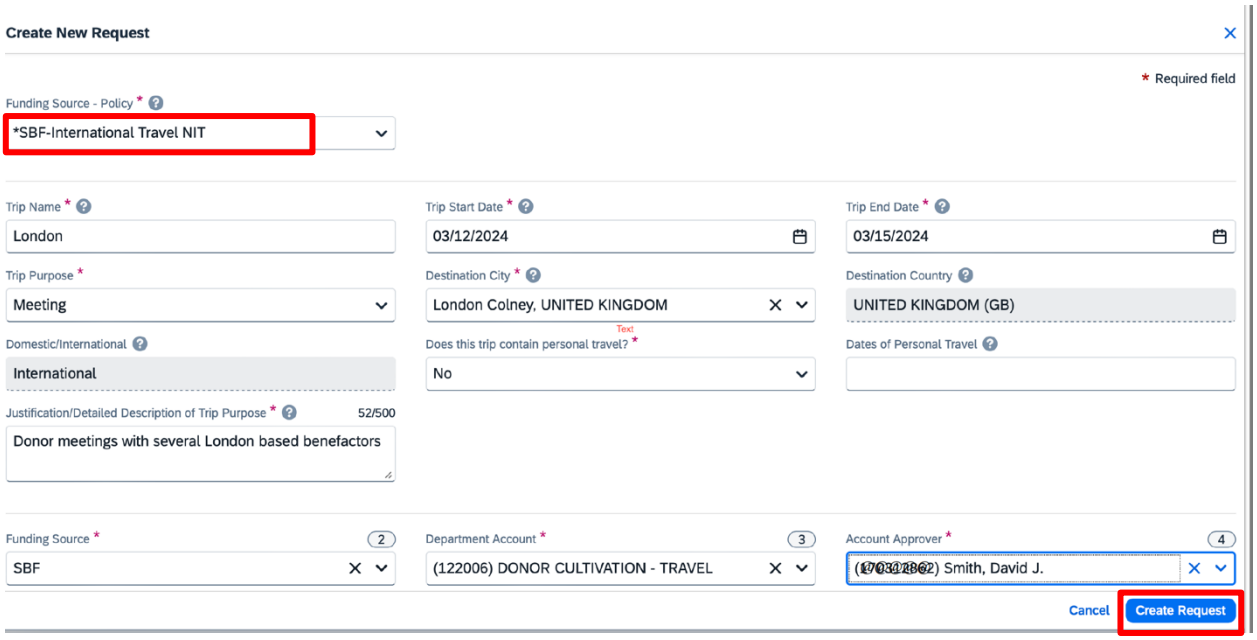
SBF policy requires **all international travelers** to obtain authorization **before** an **International trip** is made. The authorization must be fully approved by the traveler's supervisor and account manager (cost approver) before the trip starts. Using Concur Request, you can submit an authorization request. **SBF does not require you to list your expected expenses; however, you will need to enter *at least one estimated expense to be able to submit the request.***

To create a request

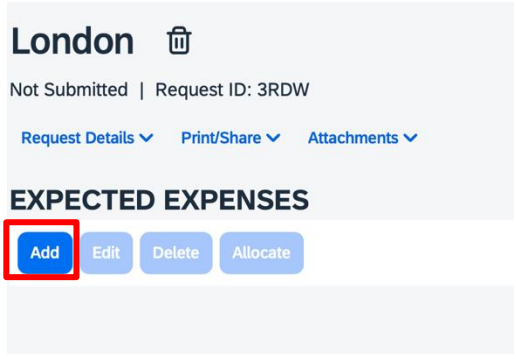
1. From the SAP Concur home page, on the **Quick Task** bar, place your mouse pointer over **Start a Request**.



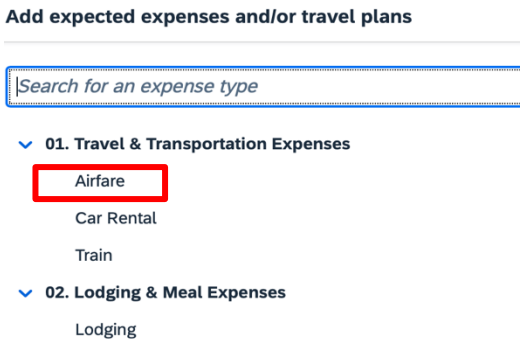
2. On the **Create New Request** page, Choose **SBF-International Travel NIT** as the Funding Source-Policy and complete the required fields (indicated with a red asterisk), and then click **Create**.



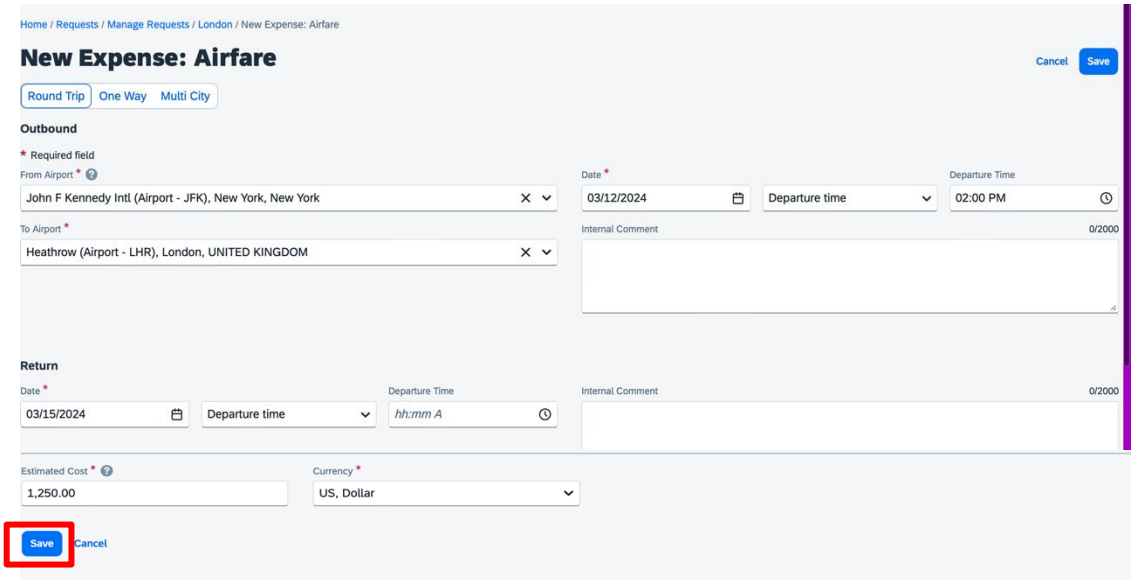
3. Click **Add** to enter an expected expense(s) – you can add estimates for the following expense types: airfare, car rental, train and lodging.



4. In this example, you will see how to add your airfare. Select **Airfare** from the list.

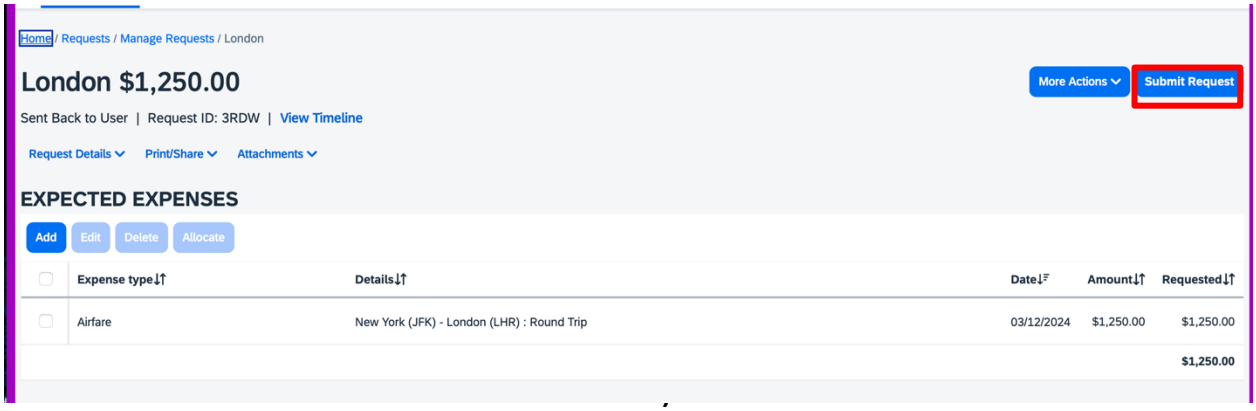


5. On the **New Expense** page, complete the required fields. Click **Save**.

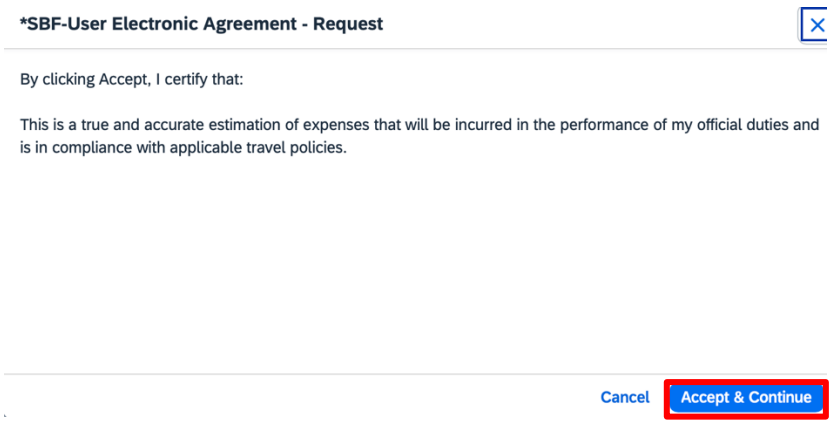


6. Continue to add any further anticipated expenses to the request.

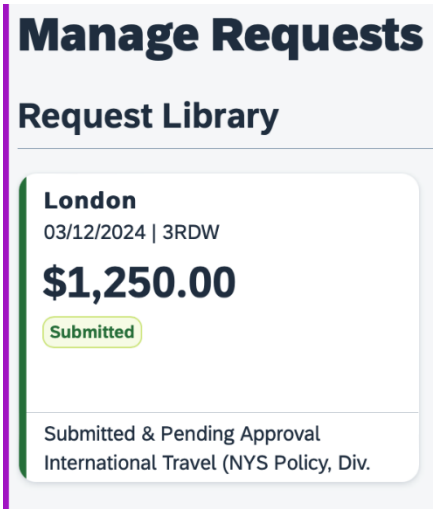
7. When you are done entering expected expenses hit **Submit Request**.



8. Click **Accept & Continue** to certify the estimates you are submitting and your compliance with the SBF travel policy.



9. The request will be routed for review and approval by the Department of Enterprise Risk Management (ERM) your immediate supervisor and the account approver.

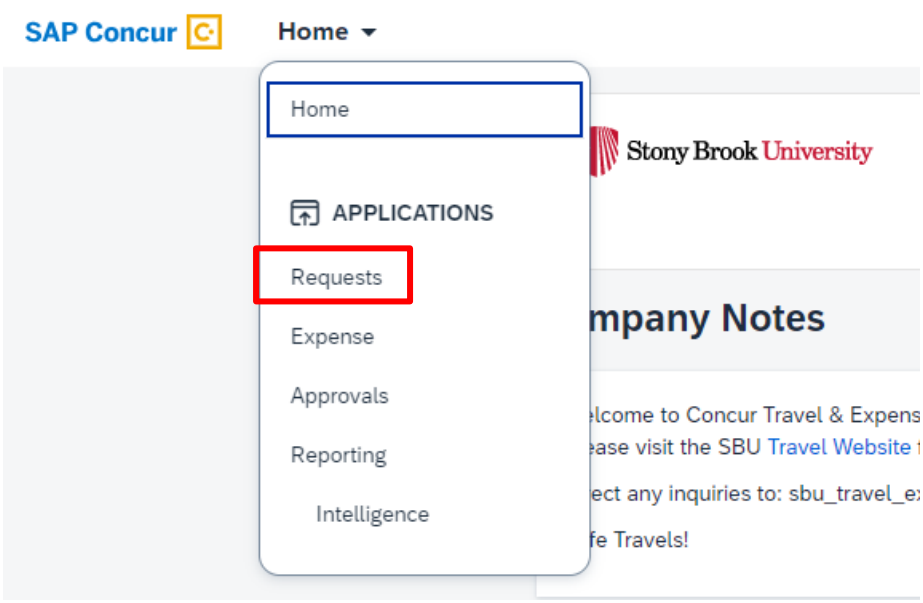


Creating an Expense Report from an Approved Request

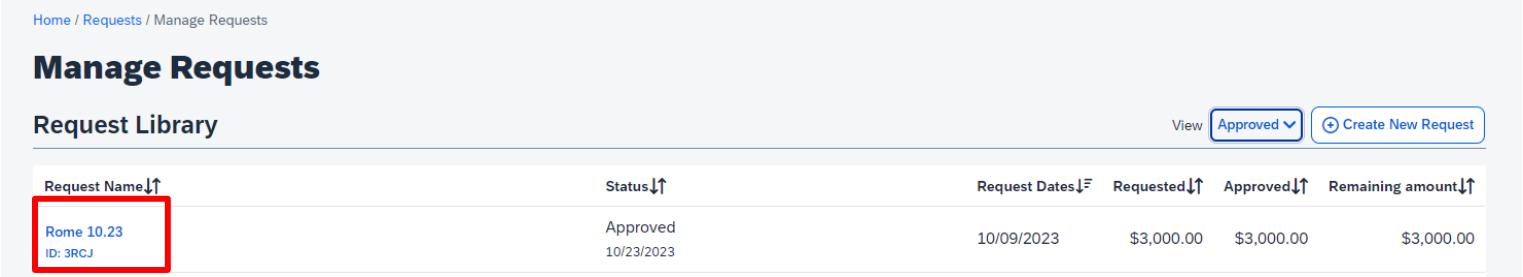
Once you have completed your international trip, and are seeking reimbursement for expenses, you will be able to create an expense report from the approved request. **YOU WILL NOT BE ABLE TO SUBMIT EXPENSE REIMBURSEMENTS FOR AN INTERNATIONAL TRIP IF YOU DO NOT HAVE A CORRESPONDING APPROVED REQUEST.**

To create expense report

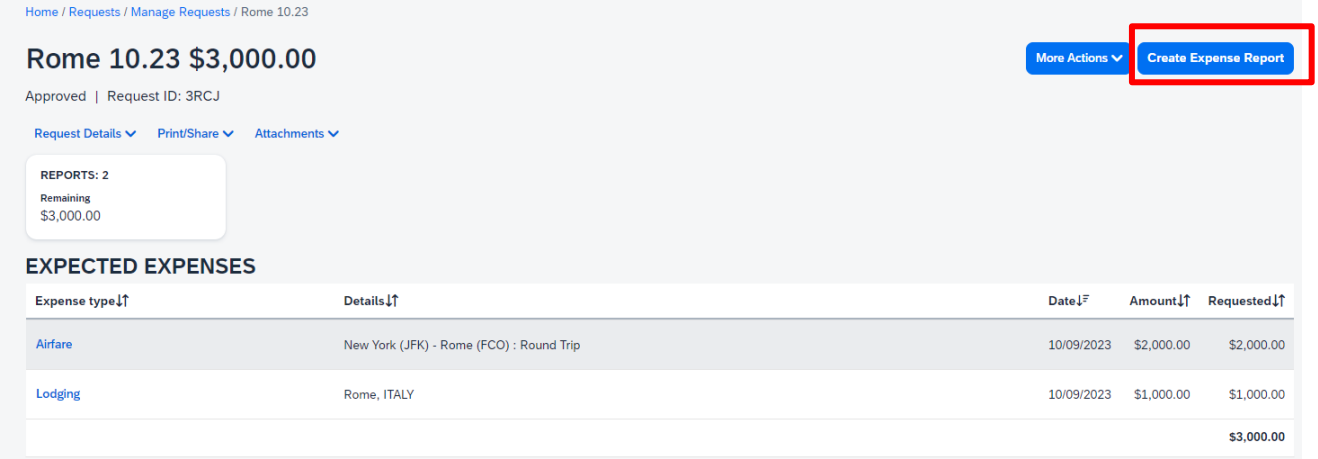
1. From the SAP Concur home page click the Home dropdown and select **Requests**.



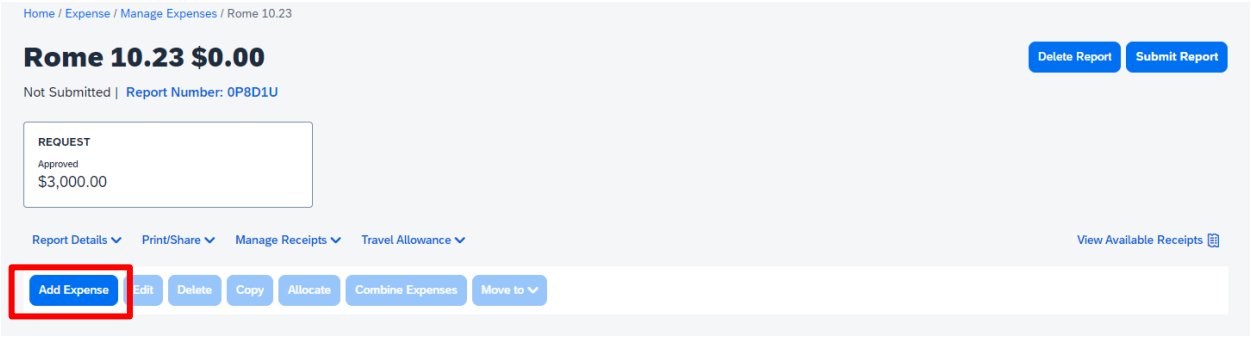
2. On the **Manage Requests** page, click on the appropriate approved request



3. The request and all expected expenses that you entered with the request will appear. To create the expense report from the request, click **Create Expense Report**.



4. Add Expenses by clicking on the **Add Expense** tile.



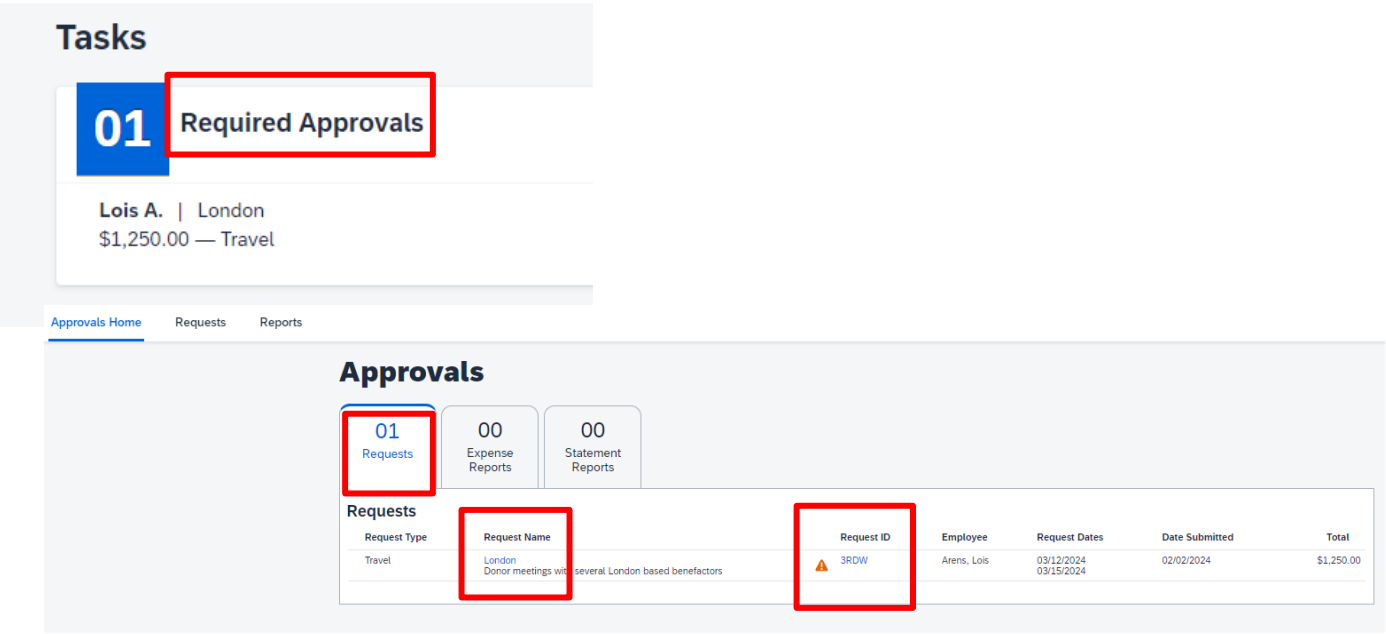
Approving Requests (Supervisors and Account Managers)

The international traveler's immediate supervisor and account manager (cost approver) are responsible for reviewing and approving requests.

To approve a request

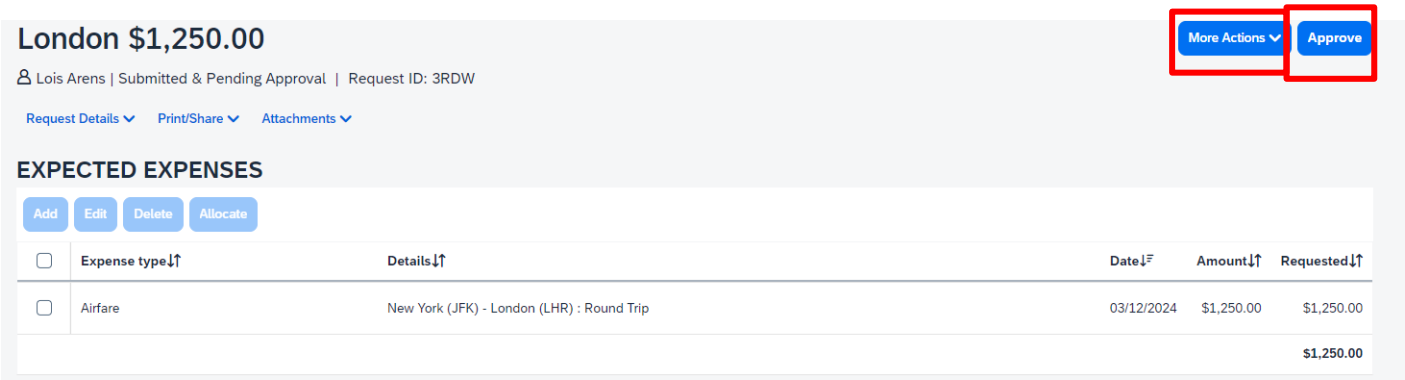
1. From the SAP Concur home page, in the **My Tasks** section, click **Required Approvals**.

   On the **Approvals** home page, click **Requests.**

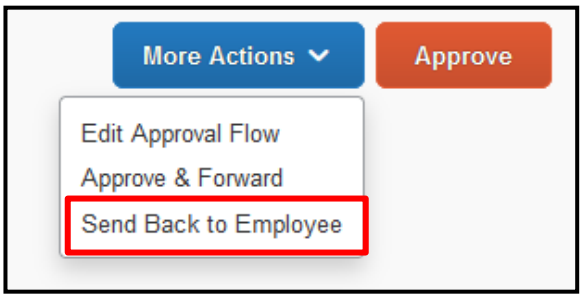


Click on either the **Request Name** or the **Request ID**.

2. After reviewing the request, determine which action to take next. Your choices are:
   - Send Back to Employee - Click **More Actions**
   - Approve - Click **Approve**
   - Approve & Forward – Click **More Actions**
   - Edit Approval Flow – Click **More Actions**



Sending request back to the employee



1. IF there are errors in the request or it violates policy in some way, click **More Actions** and then select **Send Back to Employee**.

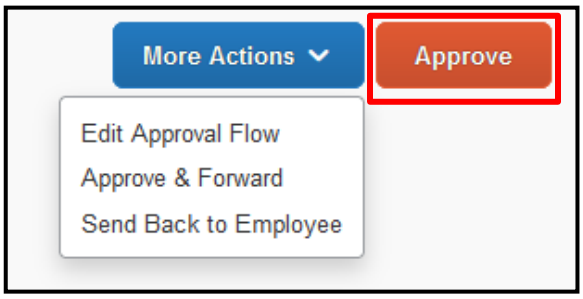
   When sending a request back to an employee, you are required to enter a comment, which explains the reason for returning the request and the corrective actions the employee should take.

2. In the **Send Back to Employee** window, enter the **Comment**, then click **Send Back**.

To approve the request

1. IF there are no errors or policy violations and no other managers need to review the request, click **Approve**.

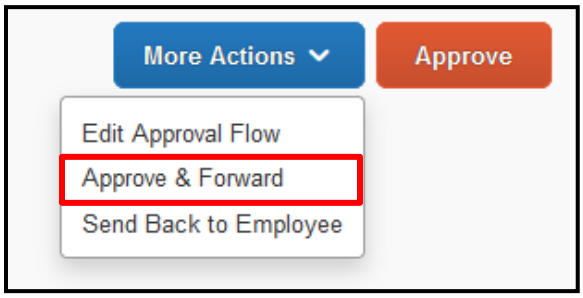
   The employee will be notified that the request has been approved and it will no longer appear in your approval queue.



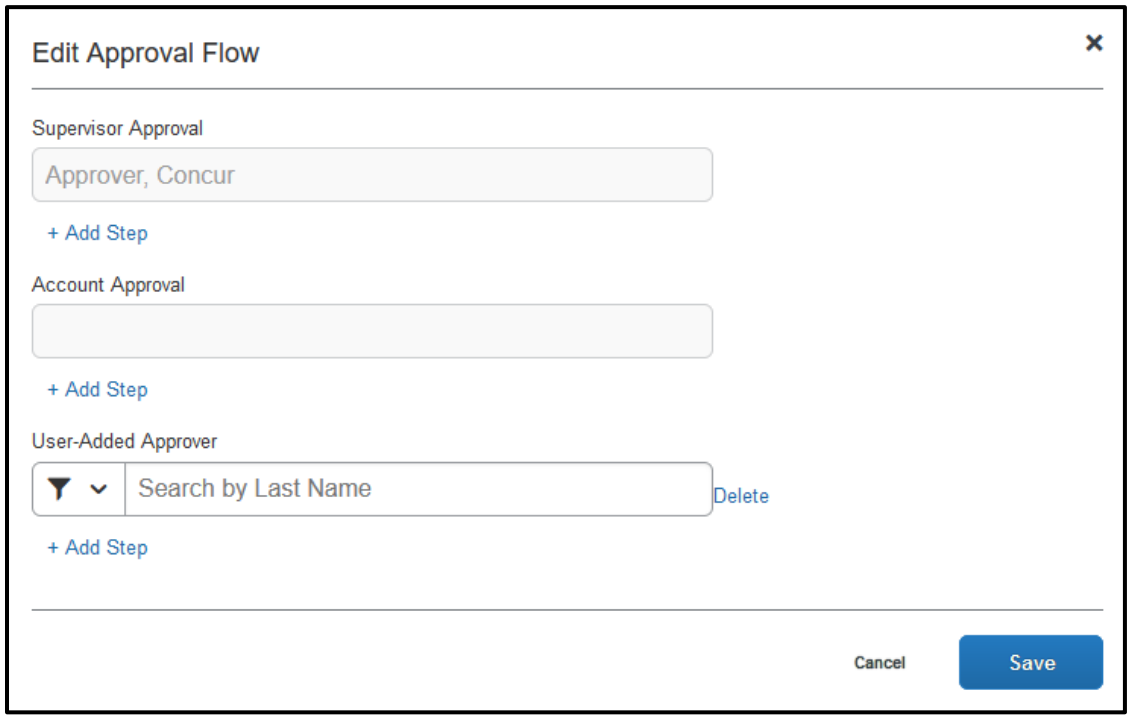
To approve and forward the request to an additional approver

1. IF there are no policy violations but the request requires the approval of additional managers, click **More Actions** and then select **Approve & Forward**.

   NOTE: **Approve & Forward** is most often used when the cost of a request is shared by multiple teams or departments with separate budgets.



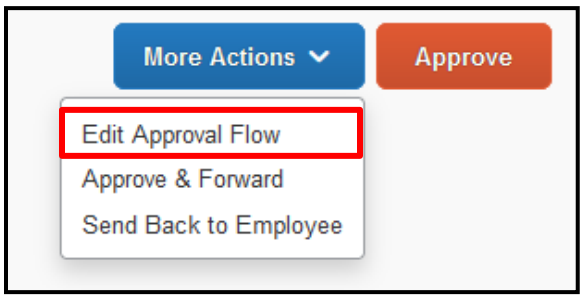
2. In the **Edit Approval Flow** window, **Add a Step** as needed, then search for and select the approver in the **User-Added Approver** field.



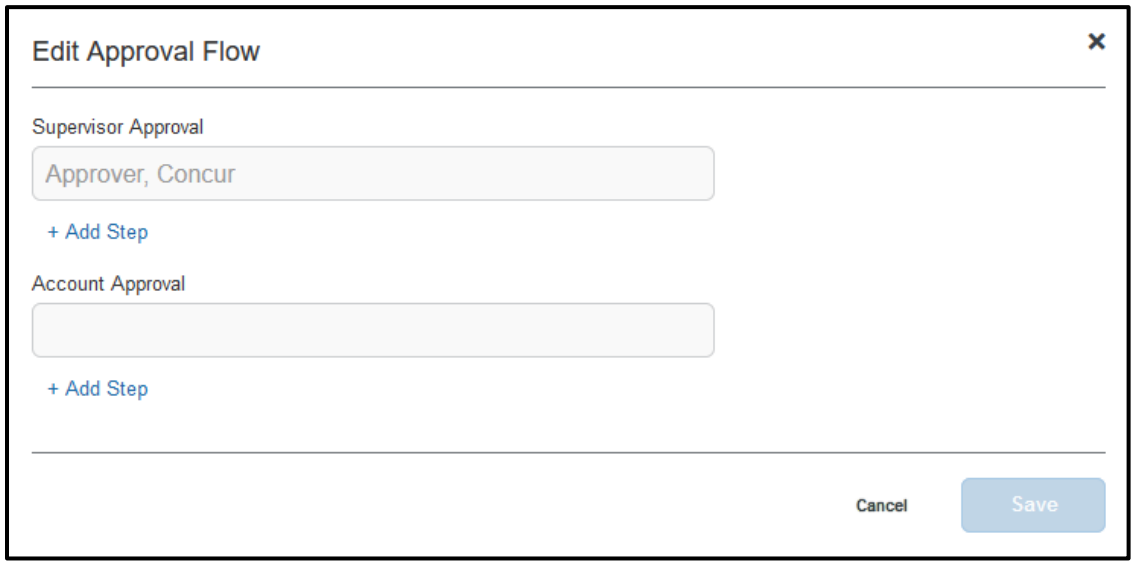
3. When you are done adding your approval steps, click **Save**. to approve and forward the request on to the next step and approver you added to the workflow.

To edit the approval flow

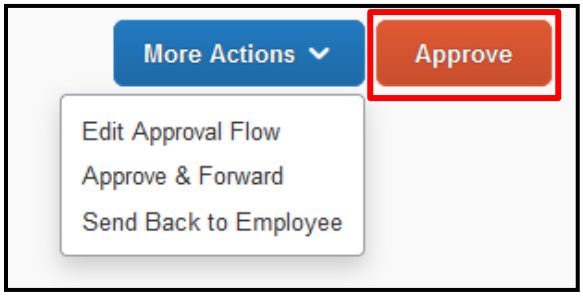
1. IF there are no policy violations but the request requires the approval of several other managers, click **More Actions**, and then select **Edit Approval Flow**.



2. In the **Edit Approval Flow** window, click **Add Step** to add an additional approval step for this request, or several steps, as needed.
3. In the **User-Added Approver** field, search for and select the approvers that you want to add to the workflow.



4. When you are done adding approval steps and approvers, click **Save**.
5. Click **Approve.**

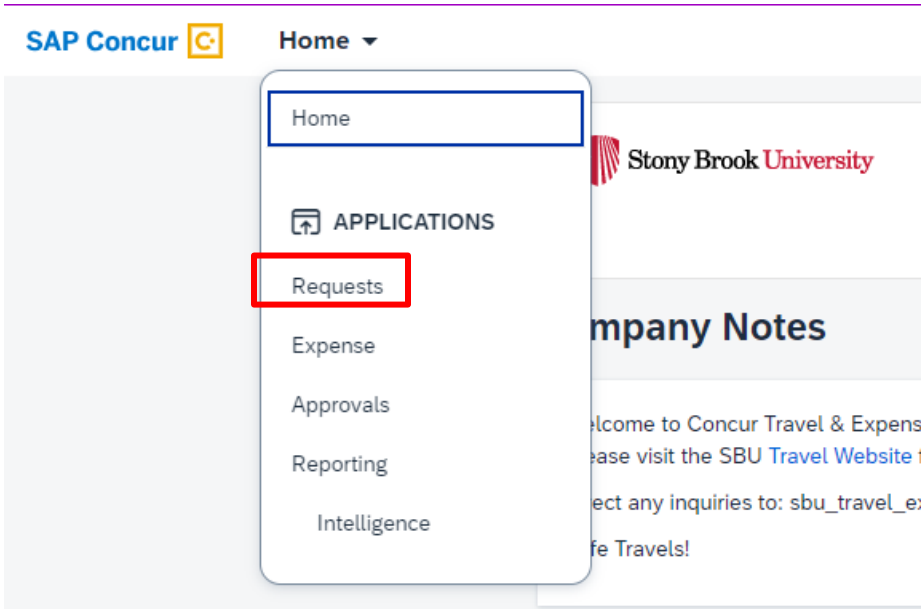


Closing a Request

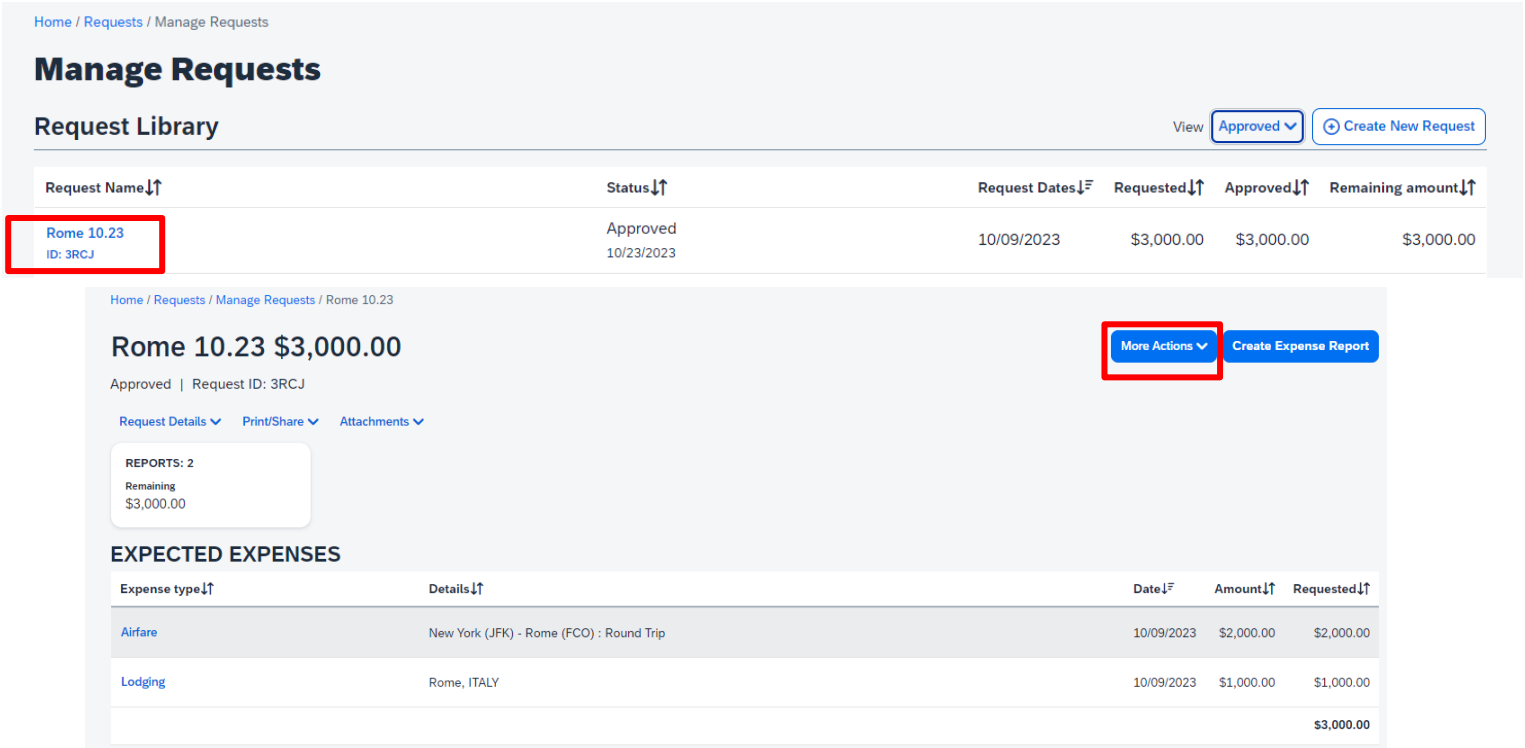
After you submit all your expenses related to a request, you can close the request. After you close a request, you can no longer associate it with an expense report.

NOTE: If you close a request that is associated with an unsubmitted expense report, the request is disassociated from the expense report. The authorized amounts are removed, and the request balance is reduced to zero.

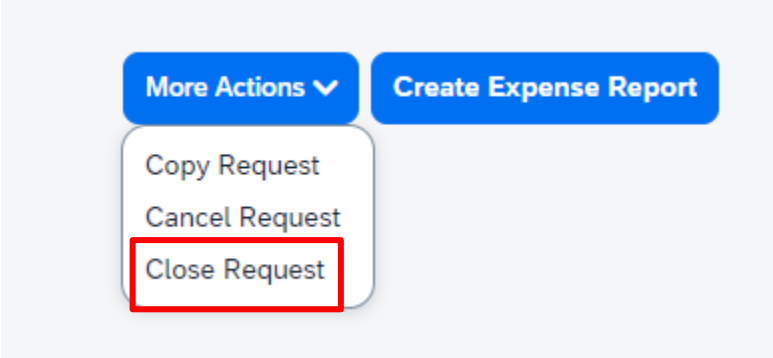
1. From the SAP Concur home page click the Home dropdown and select **Requests**.



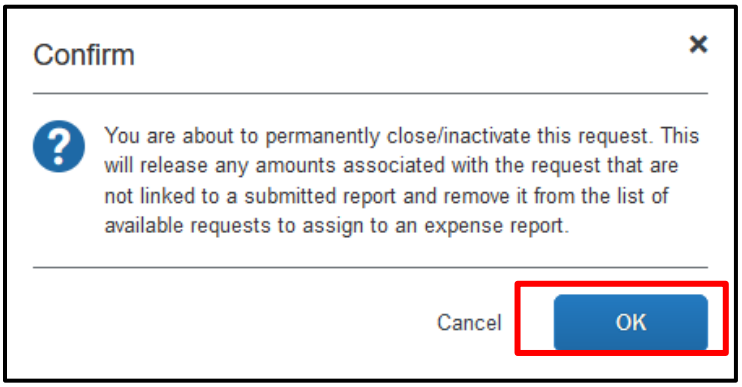
2. Select the tile for the request that you want to close, and then select **More Actions**



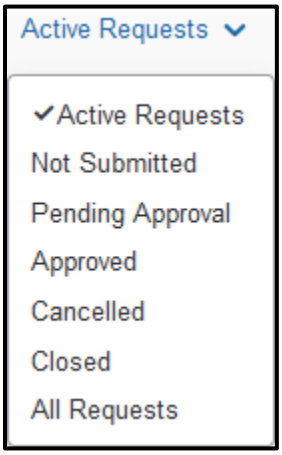
3. Click **More** then select **Close Request.**



4. Click **OK** to permanently close/deactivate the request.



5. To view closed requests, on the **Active Requests** page, click the **View** dropdown arrow, and then select **Closed/Inactivated Requests**.



A list of your closed requests is displayed. You cannot attach a closed request to an expense report.