

**Stony Brook Foundation
Concur Travel Expense Reimbursement**



SAP Concur
Technologies

April 1, 2024

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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, Research Foundation or Stony Brook Foundation funding for their travel expenses.

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Important Note for Users

Creating travel expense reports

In order to submit travel expense reimbursement 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(s).

 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	Stony Brook ID #	WolfMart Approver	Level of Authority <small>If left empty, full authority is assumed.</small>	Signature
✎ Add/Remove Lois A Arens	123456789	Authorized		 <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; font-size: small;"> A signature is on file for this individual </div>

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

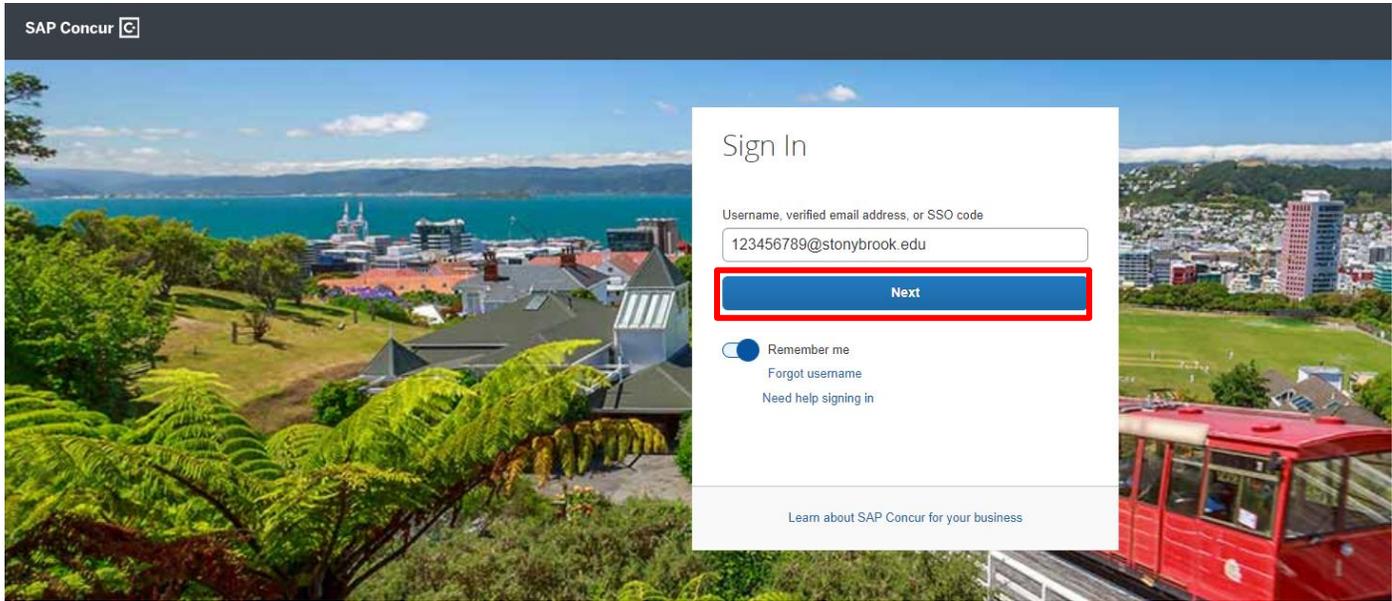
Please identify other account specific users here (e.g., [Account Assistant](#), [Report Recipient](#), [WolfMart Requester](#), [iLab User](#), [Property Control Coordinator](#), [Traveler](#)).

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

Signing in to SAP Concur

- 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**.

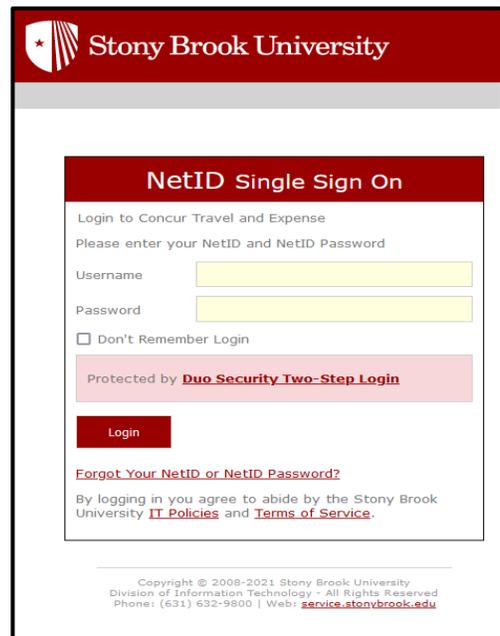
Sign in with:



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.

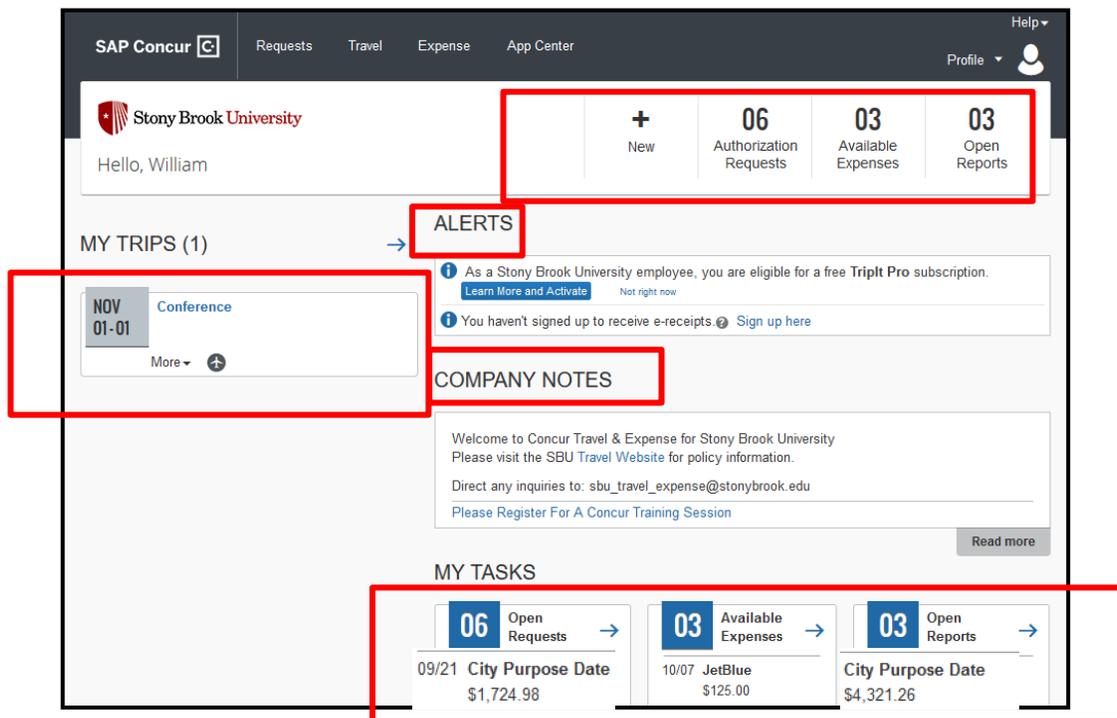


Exploring the SAP Concur Home Page

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"> Start a new expense report, travel request*, corporate card reconciliation etc. Open expense reports and requests* Manage available expenses <p>* A request is an authorization for a travel expense made <i>before</i> incurring the travel costs. An expense report is the summation of all travel expenses <i>after</i> the costs are incurred. Required only for international travel if using SBF funds.</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.

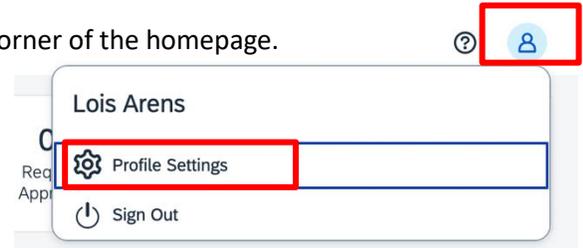


Updating Your Expense Profile

To access your profile information

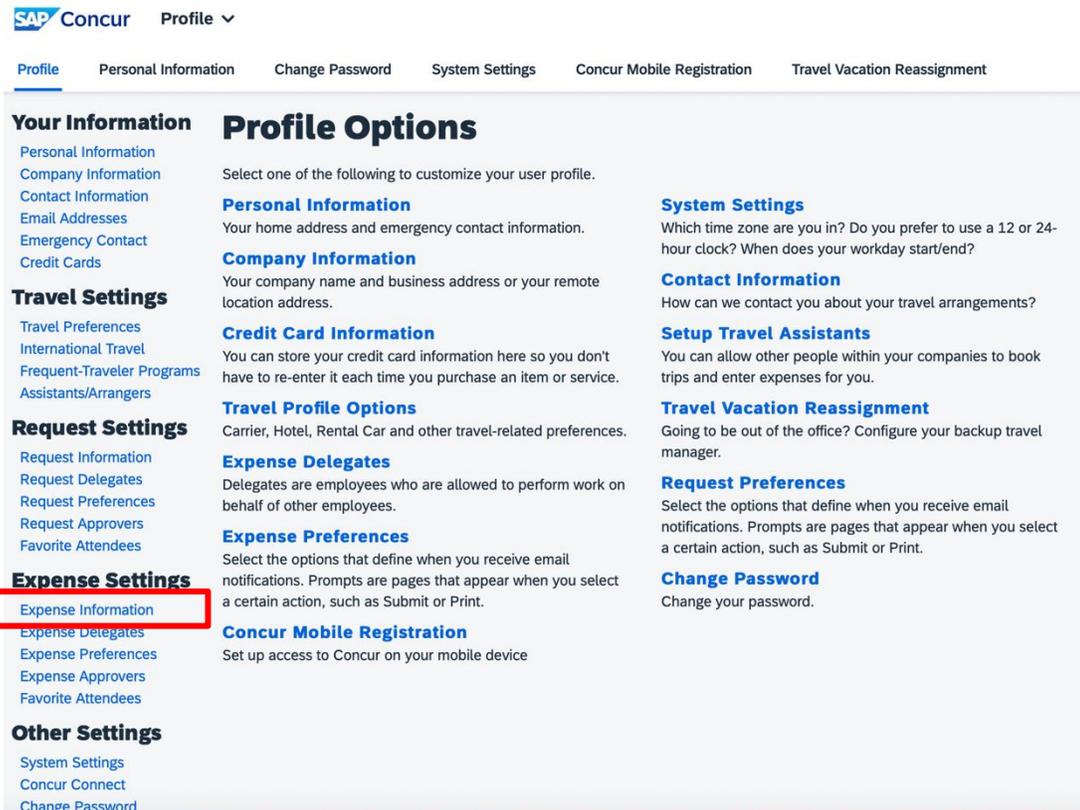
1. Click the **Person Icon** > **Profile Settings** in the upper right corner of the homepage.

The **Profile Options** page appears.



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, Expense Delegates and Expense Preferences.

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**.
 - 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.



Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Concur Mobile Registration**
Set up access to Concur on your mobile device.
- System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**
How can we contact you about your travel arrangements?
- Setup Travel Assistants**
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.
- Request Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Change Password**
Change your password.

- Review the information is accurate under **Expense Information**.

Expense Information

User Group	Address 1	Address 2	City
RF Group	<input type="text"/>	<input type="text"/>	<input type="text"/>
State	Country	Zip Code	Official Station
<input type="text"/>	<input type="text"/>	<input type="text"/>	West of Nicolls Road/11794
Reimbursement Currency	Traveler Type	NYS ID	RF Supplier ID
US, Dollar	<input type="text"/>	<input type="text"/>	<input type="text"/>
User			
(170007924) Arens, Lois A			

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

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

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.

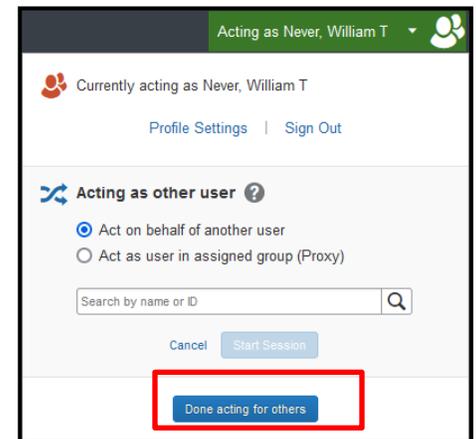
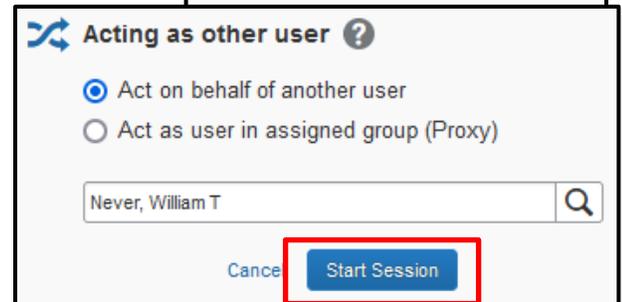
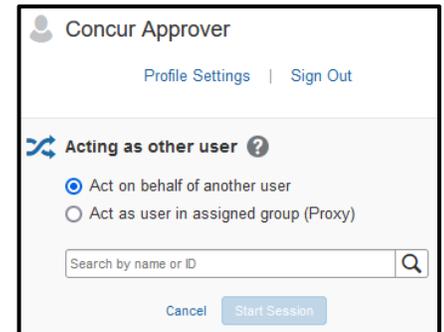
To work as a delegate

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.



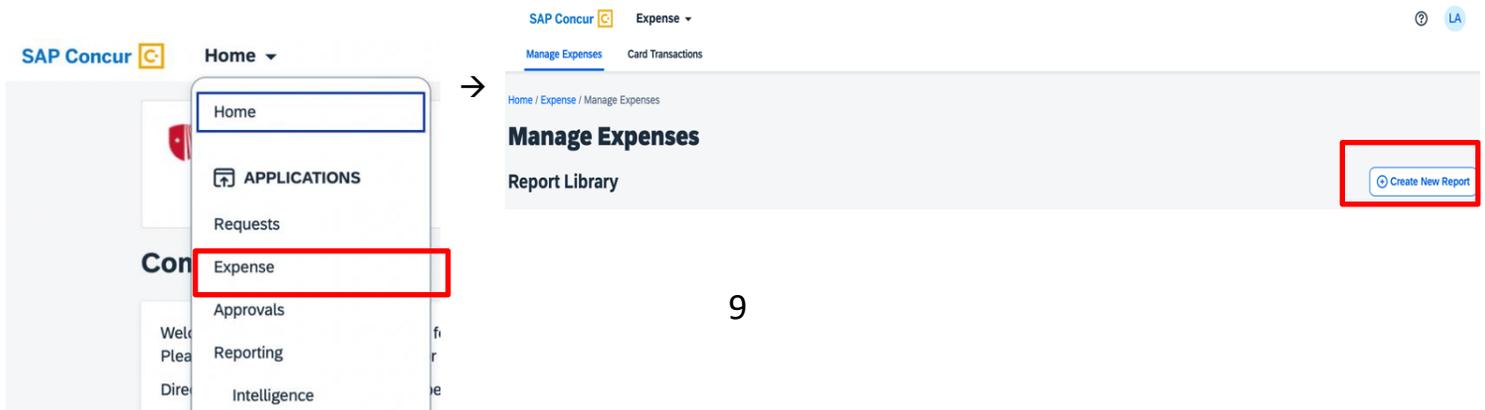
5. You are now officially working on behalf of that person. Complete the normal processes for creating reports, printing, etc. To select a different user, follow the same steps but click a different name.
6. To return to your own tasks, click **Acting as**, and then select **Done acting for others**.



Creating a New Expense Report for Travel Reimbursement

To create a new expense report:

1. From the **Home** dropdown tab choose **Expense**, on the **Manage Expenses** page click the + **Create New Report** tile.



- For the Funding Source - Policy field choose **SBF-Employee Travel Reimbursement Policy** from the dropdown menu. Complete all the required fields (marked with red asterisks). For the Funding Source field on the bottom left of the page, you must choose SBF. Note that the SBF Department(s) in the Department Account dropdown are only the ones in which you are an Account Director, Signatory Delegate or Traveler. The Account Approver dropdown will populate for the Department you choose.

Create New Report >

Create From an Approved Request * Required field

Funding Source - Policy * ?
*SBF-Employee Travel Reimburse...

Trip Name * Trip Start Date * Trip End Date * Trip Purpose * ?

Domestic/International * Trip Destination City * ? Trip Destination State * ? Trip Destination Country * ?

Does this trip include personal travel? * Dates of Personal Travel Justification/Detailed Description of Trip Purpose * 0/500

Funding Source * ? Department Account * ? Account Approver * ? Report Currency

Approval Status Report Total Personal Expenses Amount Not Approved

Special Note on Travel Allowance Selection: For the SBF POLICY the default is NO since SBF does not issue travel allowances. Reimbursements are typically issued on actual meal receipts. **Select Yes ONLY if you are requesting reimbursement based on meal per diems.**

Travel Allowance

(1) FOR STATE or RF POLICIES: Select YES if claiming meal per diems (must provide lodging receipt). Select NO if using the Unreceipted Lodging/Meals expense type (if you stayed with family and/or friends). (2) FOR SBF POLICY: Select YES if claiming meal per diems. Select NO if providing meal receipts.

- Yes, I require Travel Allowance
- No, I do not require Travel Allowance

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

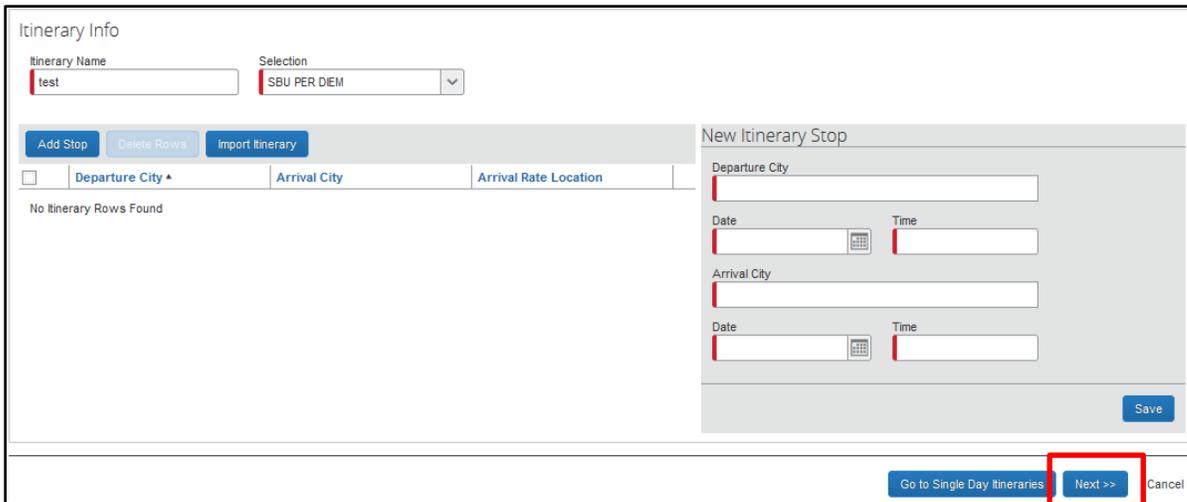
Cancel Next

STEPS 3 – 11 BELOW ARE FOR PER DIEM MEALS ONLY

If you are requesting per-diem reimbursement, select **Yes, I require Travel Allowance** and click **Next**

IF YOU ARE SUBMITTING RECEIPTED EXPENSES
PROCEED TO STEP 12

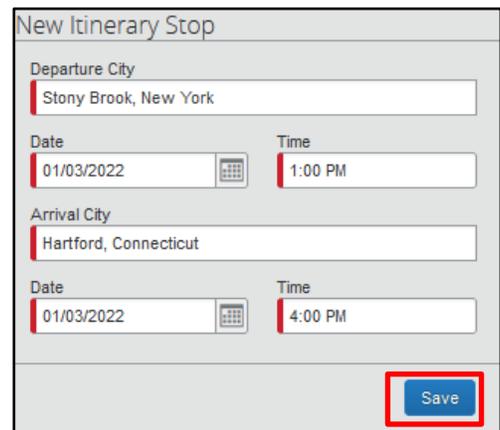
3. If you select **Yes (you are requesting per diem reimbursement for meals)**, the Itinerary Info page opens.



4. Complete the fields for the **New Itinerary Stop** based on your travel.
5. Click **Save**.
6. 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.

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



Itinerary Info

Itinerary Name: Selection:

<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

New Itinerary Stop

Departure City:

Date: Time:

Arrival City:

Date: Time:

8. 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
Itinerary: test	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
Itinerary: Training	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

9. 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

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

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

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
<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
						\$207.00

11. The **Meals – Per Diem** expenses now appear in your report.

Received Expenses

12. For receipted expenses, including meals, continue from #2 above. Make sure to answer **NO to Travel Allowance** question and then click **Create Report**.

Travel Allowance

(1) FOR STATE or RF POLICIES: Select YES if claiming meal per diems (must provide lodging receipt). Select NO if using the Unreceipted Lodging/Meals expense type (if you stayed with family and/or friends). (2) FOR SBF POLICY: Select YES if claiming meal per diems. Select NO if providing meal receipts.

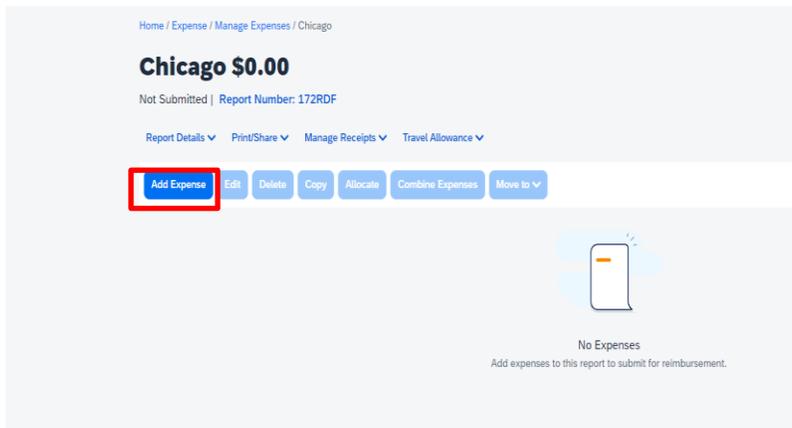
Yes, I require Travel Allowance

No, I do not require Travel Allowance

Cancel

Create Report

13. Click **Add Expense**. Select the appropriate expense type from the list.



Home / Expense / Manage Expenses / Chicago

Chicago \$0.00

Not Submitted | Report Number: 172RDF

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

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



No Expenses
Add expenses to this report to submit for reimbursement.

Add Expense ×

0 Available Expenses + Create New Expense

Search for an expense type

01. Travel & Transportation Expenses

- Airfare
- Airline Fees (Baggage Fees/Change Fees)
- Bus
- Car Rental
- Car Rental Fuel
- Car Service
- Ferry

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

Complete all the required fields (marked with red asterisks) then select one of the following:

- **Add Receipt** – To upload and attach receipts (required in order to submit report)
- **Itemizations tab** – THIS FIELD IS NOT USED FOR SBF EXPENSES
- **Save Expense** – To save the expense
- **Cancel** – To exit without saving this expense

New Expense Cancel Save Expense

Details Itemizations Hide Receipt

Allocate

Expense Type * * Required field
Lodging/Hotels

Transaction Date * Trip Purpose
01/18/2024 Conference

Additional Information/Justification Vendor *
Four Seasons

Destination City * Amount *
Chicago, Illinois 1,500.00

Currency *
US, Dollar (USD)

Comment 0900

Receipt

↑
Add Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

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**.

Home / Expense / Manage Expenses / Chicago

Chicago \$1,550.00

Not Submitted | Report Number: 172RDF

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

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket/Personal Card	Lodging/Hotels	Four Seasons Chicago, Illinois	01/18/2024	\$1,500.00
<input checked="" type="checkbox"/>	Out of Pocket/Personal Card	Bus	Chicago, Illinois	01/18/2024	\$50.00
					\$1,550.00

- The new expense is added to the **Expenses** list. Notice the following:
 - The original expense date is advanced by a day.
 - All details from the original expense are copied to the new expense.
 - Receipts 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.

Adding Back-up Documentation to an Expense Report

All expense reports require you to add back-up documentation such as an agenda, brochure, invitation, etc.

To add back up documentation to an expense report

- From the manage expenses screen, click **Add Expense**.

Home / Expense / Manage Expenses / Chicago

Chicago \$1,550.00

Not Submitted | Report Number: 172RDF

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

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket/Personal Card	Lodging/Hotels	Four Seasons Chicago, Illinois	01/18/2024	\$1,500.00
<input checked="" type="checkbox"/>	Out of Pocket/Personal Card	Bus	Chicago, Illinois	01/18/2024	\$50.00
					\$1,550.00

- Search for/select **Agenda/Brochure/Invitation (\$0)** from the list. (Under 03. Other Travel Expenses)

Add Expense

0 Available Expenses Create New Expense

Search for an expense type

- Meals-Actual Cost
- 03. Other Travel Expenses
 - Agenda/Brochure/Invitation (\$0)**
 - Currency Exchange Fees
 - Passports/Visa Fees
 - Telephone/Fax Fees
- Miscellaneous
 - Travel Incidentals

3. The **New Expense** window appears, and Agenda/Brochure/Invitation populates in Expense Type. Click on **Add Receipt** and upload the required back up material(s).
4. After adding the documentation, click **Save**.

Home / Expense / Manage Expenses / Chicago / New Expense

New Expense

Cancel **Save Expense**

Details Itemizations

Expense Type * * Required field

Agenda/Brochure/Invitation (\$0)
X v

Trip Purpose Amount

Conference 0.00

Currency

US, Dollar (USD)

Comment 0/500

Save Expense
Save and Add Another
Cancel

Receipt



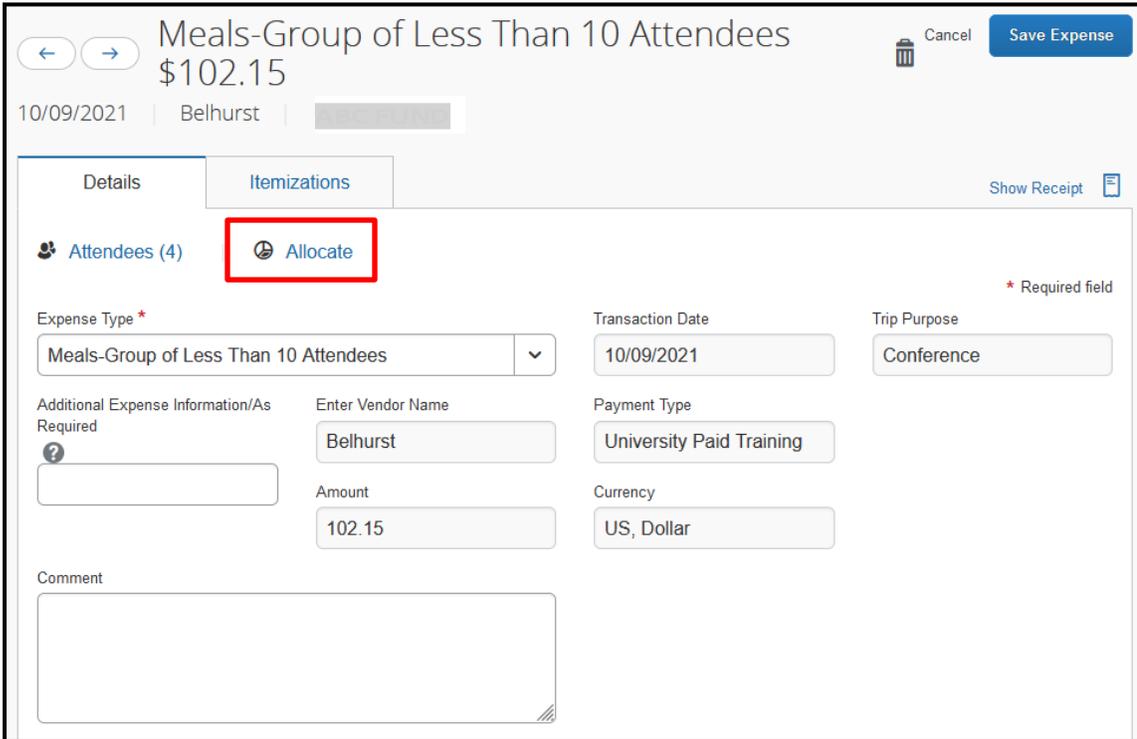
Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

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 SBF Employee Travel Reimbursement Policy.

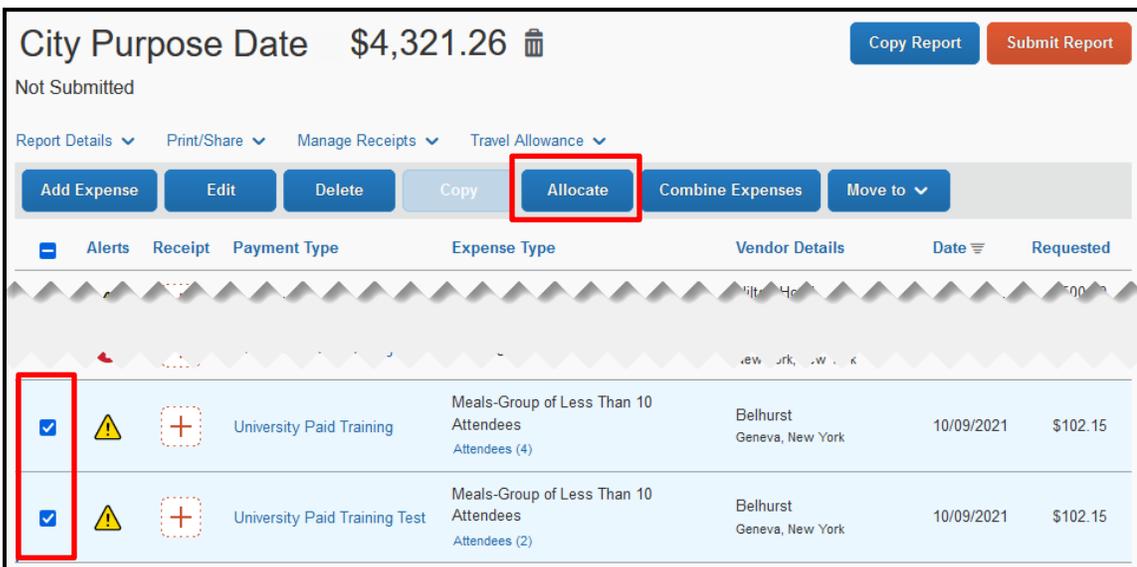
To allocate your expenses

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



The screenshot shows the SAP Concur expense form for a transaction titled "Meals-Group of Less Than 10 Attendees" with a total amount of \$102.15. The transaction date is 10/09/2021 and the vendor is Belhurst. The form includes tabs for "Details" and "Itemizations". In the "Attendees (4)" section, the "Allocate" button is highlighted with a red box. Below this, there are fields for "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), and "Currency" (US, Dollar). A "Comment" field is also present at the bottom.

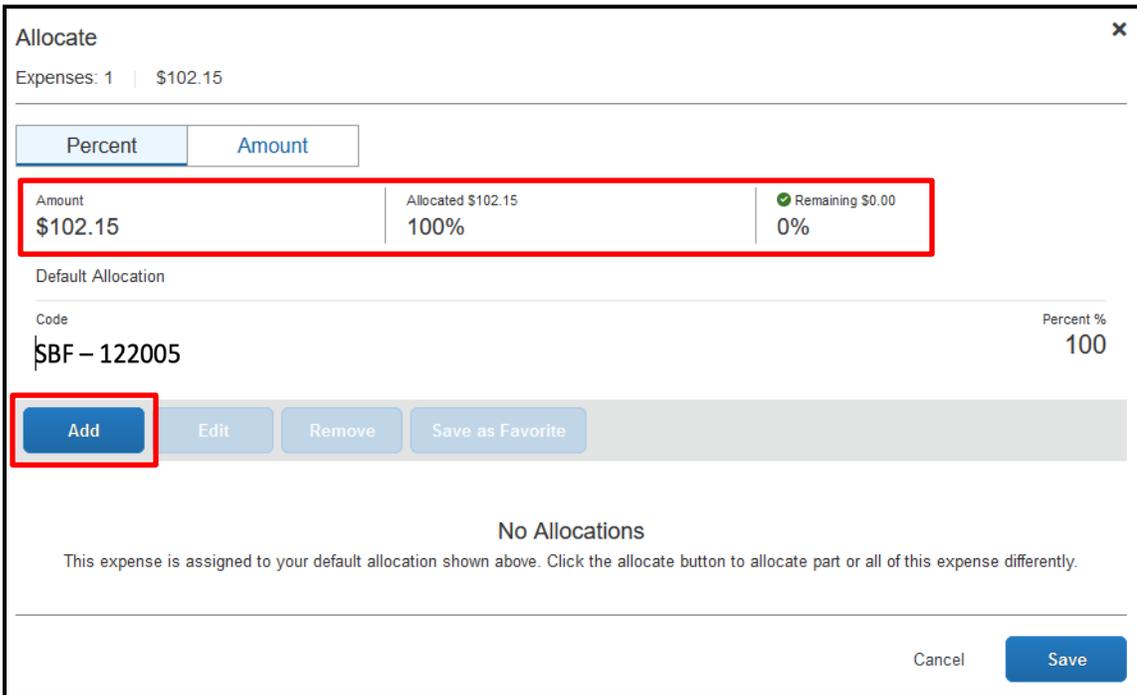
2. With the report open, to allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then click **Allocate**.



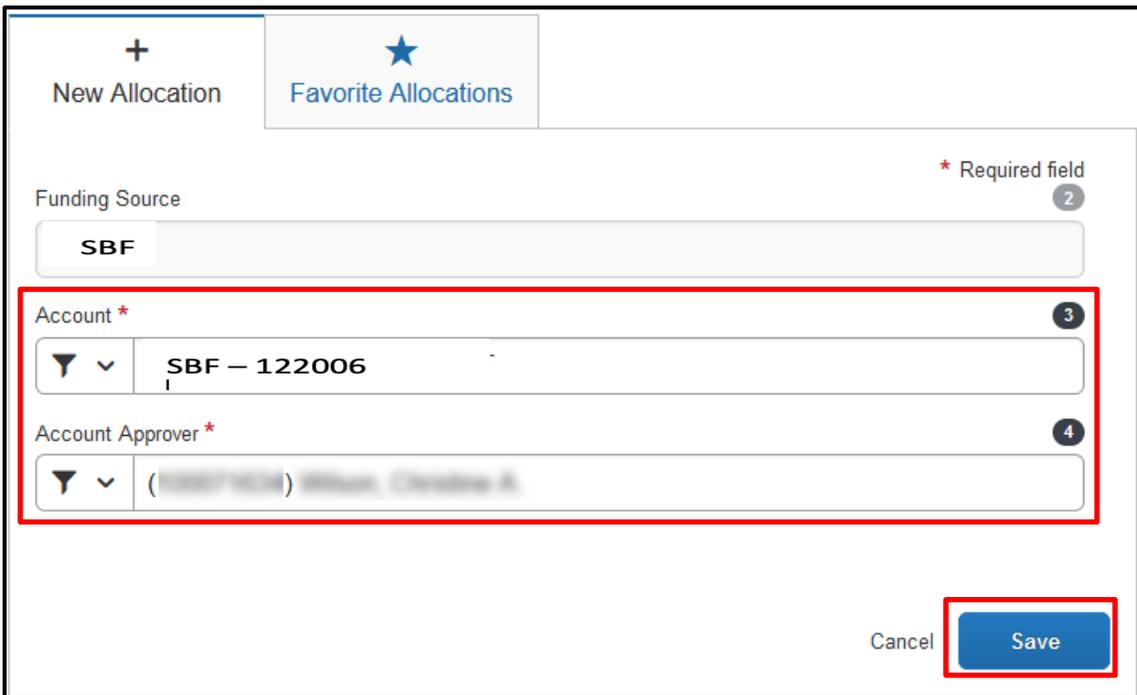
The screenshot shows the SAP Concur report interface for "City Purpose Date" with a total amount of \$4,321.26. The report is not submitted. At the top, there are buttons for "Copy Report" and "Submit Report". Below the report title, there are navigation options: "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". A row of action buttons includes "Add Expense", "Edit", "Delete", "Copy", "Allocate" (highlighted with a red box), "Combine Expenses", and "Move to". Below this is a table with columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. Two rows are selected, indicated by blue checkboxes in the "Alerts" column, which are also highlighted with a red box. The first row is for "University Paid Training" and the second is for "University Paid Training Test".

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

Percent %

SBF – 122005 0

Add

Edit

Remove

Save as Favorite

<input type="checkbox"/>	Funding Source	Account	Account Approver	Code	Percent %
<input type="checkbox"/>	SBF	XYZ FUND	Belhurst	SBF – 122005	50
<input type="checkbox"/>	SBF	ABC FUND	Geneva, New York	SBF – 122006	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)			Allocated

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.

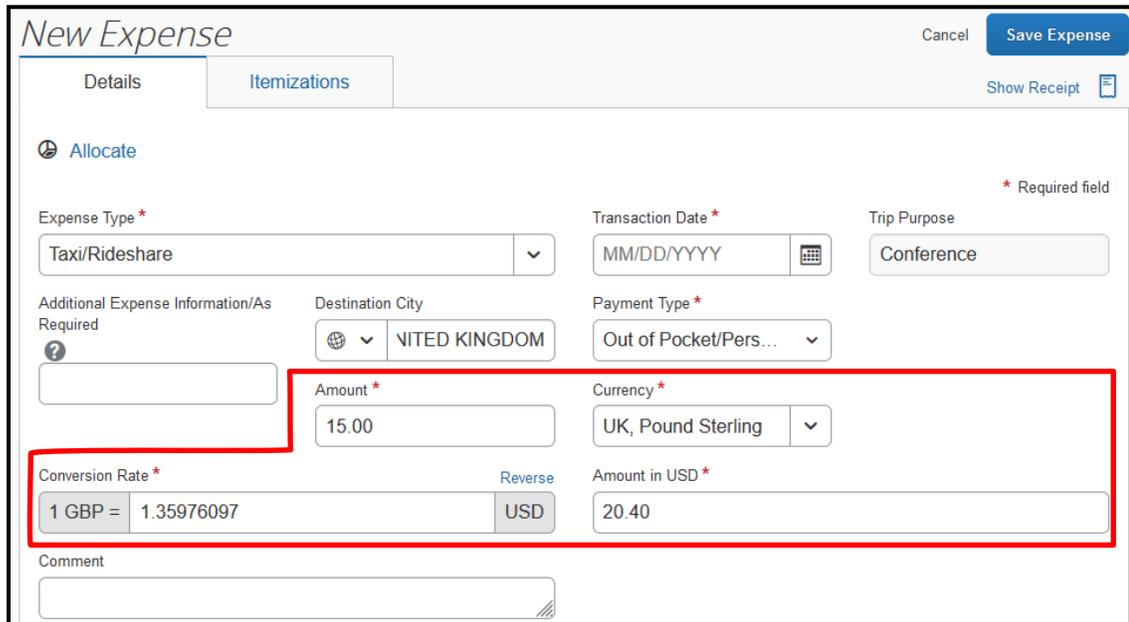
To account for an expense incurred in another currency

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 * Trip Purpose

Additional Expense Information/As Required Destination City Payment Type *

Amount * **Currency** *

Conversion Rate * **Reverse** **Amount in USD** *

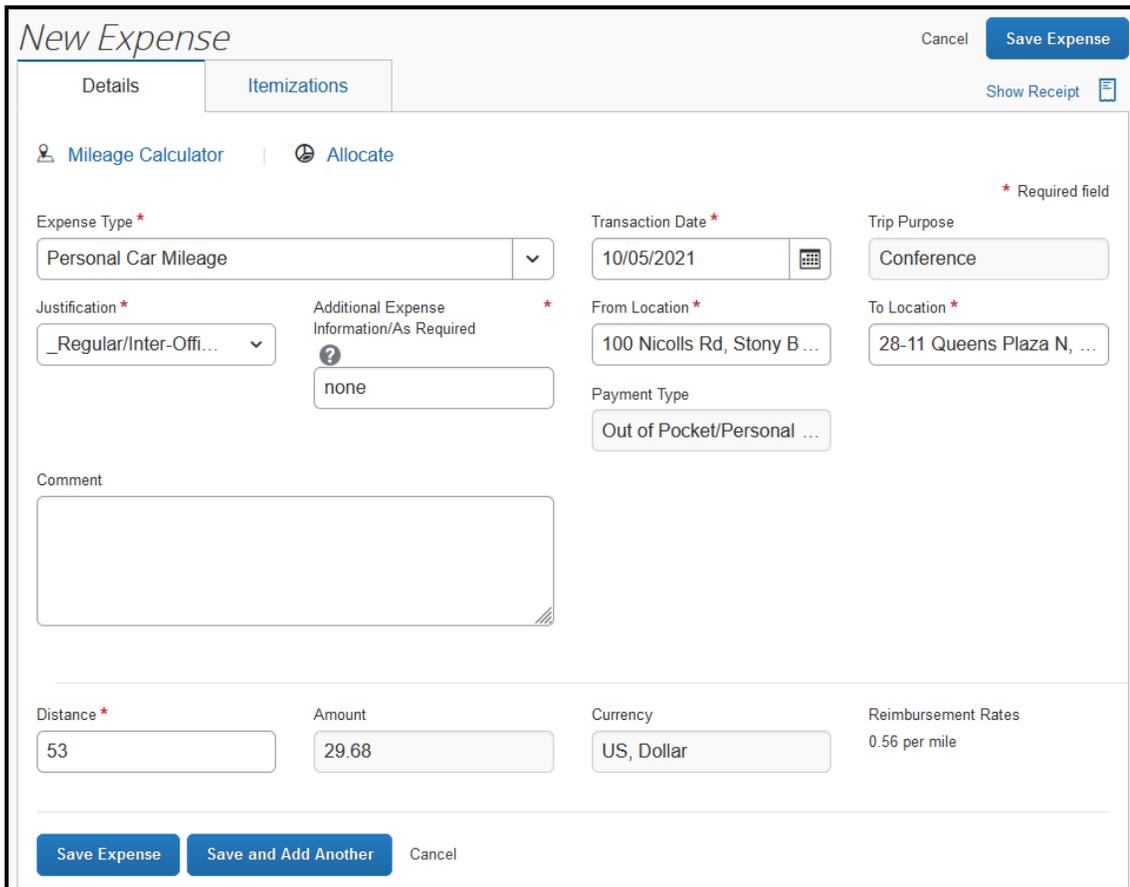
Comment

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.

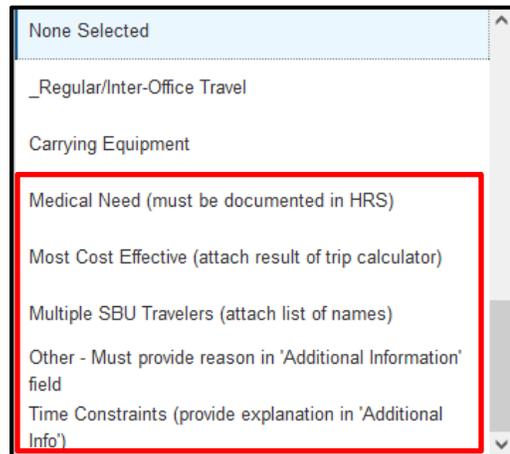
To create a car mileage expense

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).

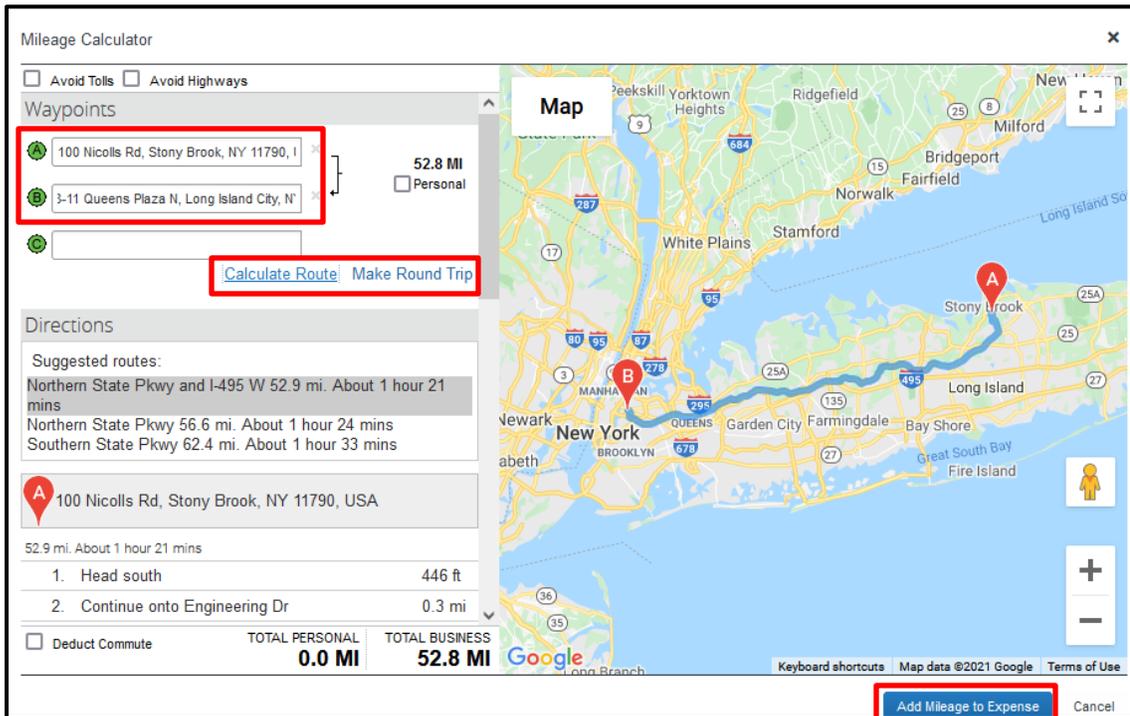


Depending on the **Justification** selected, you will need to take additional steps and/or provide an explanation in the **Additional Expense Information/As Required** field.

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

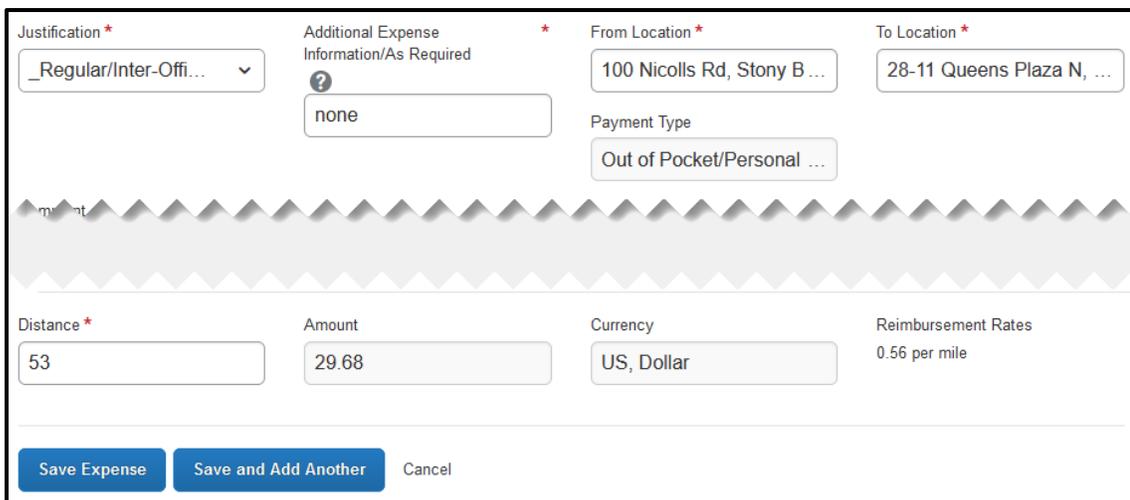


- In the Mileage Calculator window, enter the start and end addresses of your trip in the **Waypoints** fields.



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.

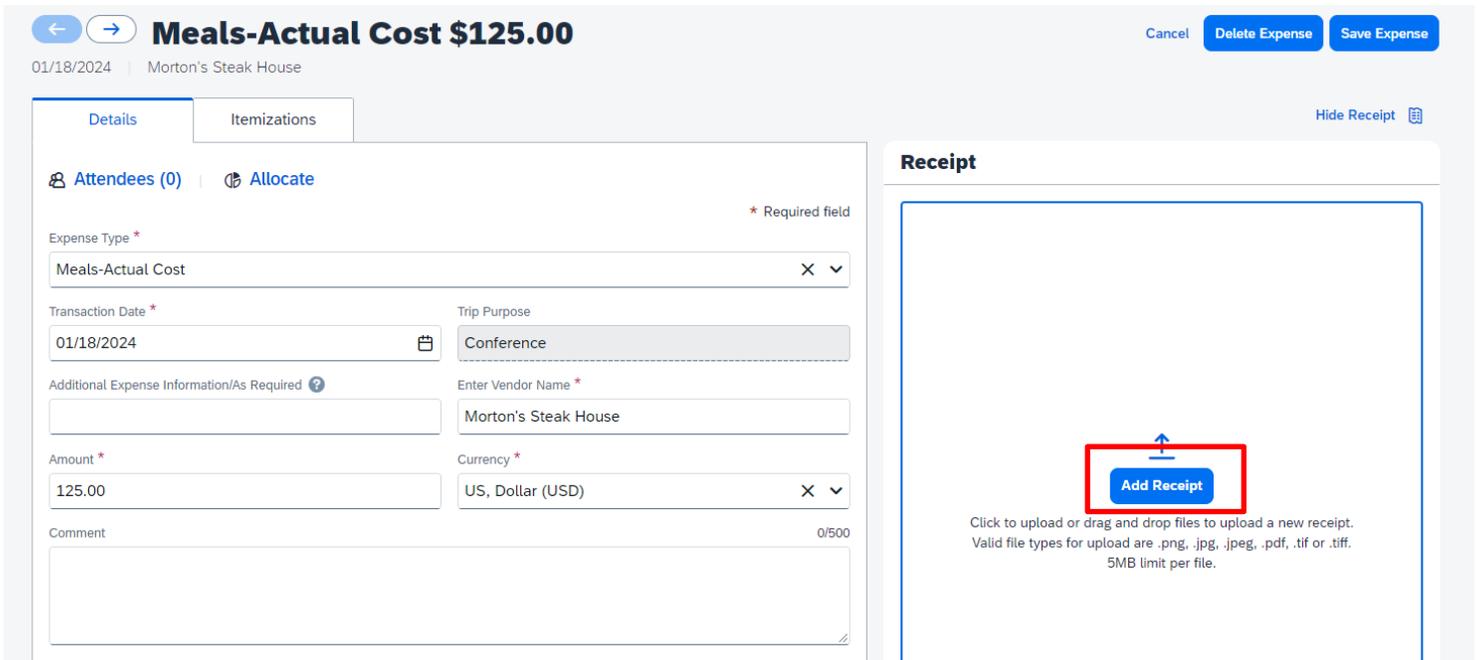
- After entering your Waypoints and defining the other parameters of your trip, click **Calculate Route**. The system will calculate the most logical path for the trip.
- Click **Add Mileage to Expense**.



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

Adding Receipts

1. Select an entry to open it.
2. On the Details tab, click **Add Receipt**.



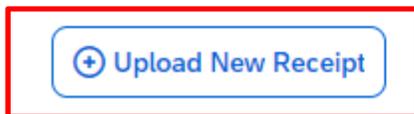
The screenshot shows the SAP Concur interface for editing an expense entry. The title is "Meals-Actual Cost \$125.00". The entry details include: Expense Type: Meals-Actual Cost; Transaction Date: 01/18/2024; Trip Purpose: Conference; Vendor Name: Morton's Steak House; Amount: 125.00; Currency: US, Dollar (USD). On the right side, there is a "Receipt" pane with an "Add Receipt" button highlighted by a red box. Below the button, text reads: "Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file."

3. You will see images of available receipts. You can choose one of these receipts or click **Upload New Receipt**. You will be brought to your browser to search for a receipt to attach.

Attach Receipt ✕

Available Receipts (24)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration. [Missing Receipt Declaration](#)



Sort By ▼

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

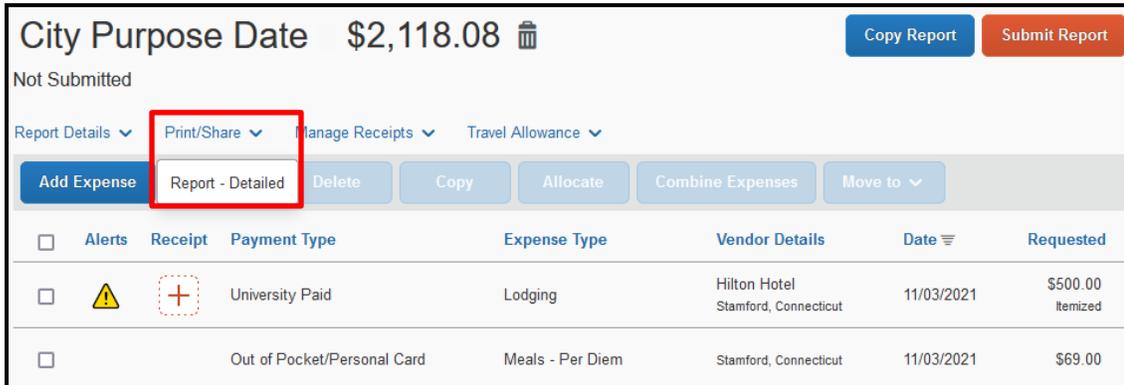
NOTE: You can **Detach** or **Append** the image from the receipt pane.

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**.



Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		 University Paid	Lodging	Hilton Hotel Stamford, Connecticut	11/03/2021	\$500.00 Itemized
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Stamford, Connecticut	11/03/2021	\$69.00

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**.



*SBF-User Agreement ✕

By clicking Accept, I hereby certify that the submitted trip(s) was/were taken for the purpose(s) indicated; that the reference accounting is accurate: that no portion has been paid; except as stated within this submission, and that the balance indicated is due or reimbursable in accordance with Stony Brook Foundation Travel Policy.

Cancel
Accept & Continue

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

Report Totals
✕

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

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

<p>Amount Total: \$56.00</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> <p>Requested Amount: \$56.00</p>	<p>Due Employee: \$56.00</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> <p>Total Paid By Company: \$56.00</p>	<p>Owed Company: \$0.00</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> <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

SUBMITTED 10/15/2021

Date Event Location

\$56.00

Pending External Validation

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.

Alert ✕

 This report has one or more errors. You must resolve the errors before submitting the report.

Close

Home / Expense / Manage Expenses / David Guide Test

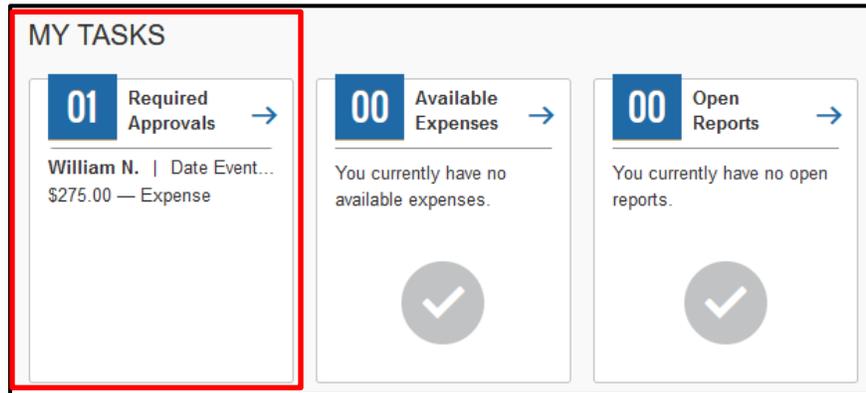
 Alerts: 2

David Guide Test \$1,559.19 Delete Report Copy Report Submit Report

Reviewing and Approving an Expense Report (for Approvers)

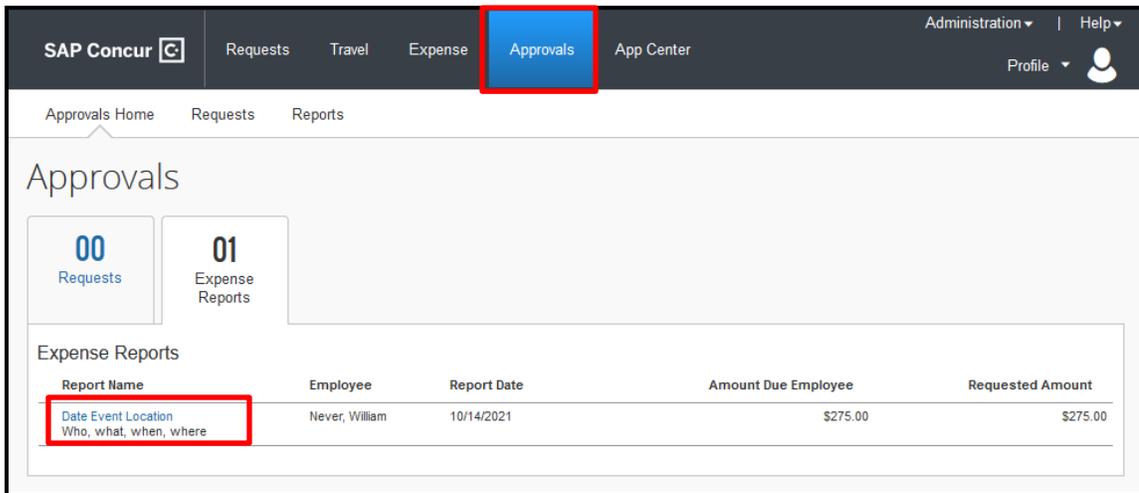
As an approver, you will need to review submitted reports and approve them for reimbursement.

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



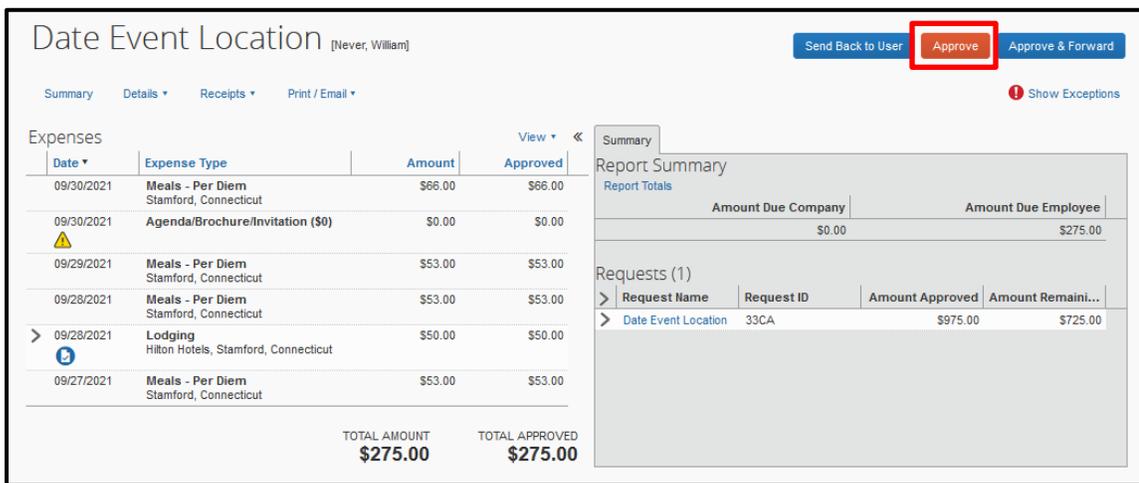
To review and approve an expense report

1. On the SAP Concur homepage, click the **Required 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
		TOTAL AMOUNT	TOTAL APPROVED
		\$275.00	\$275.00

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

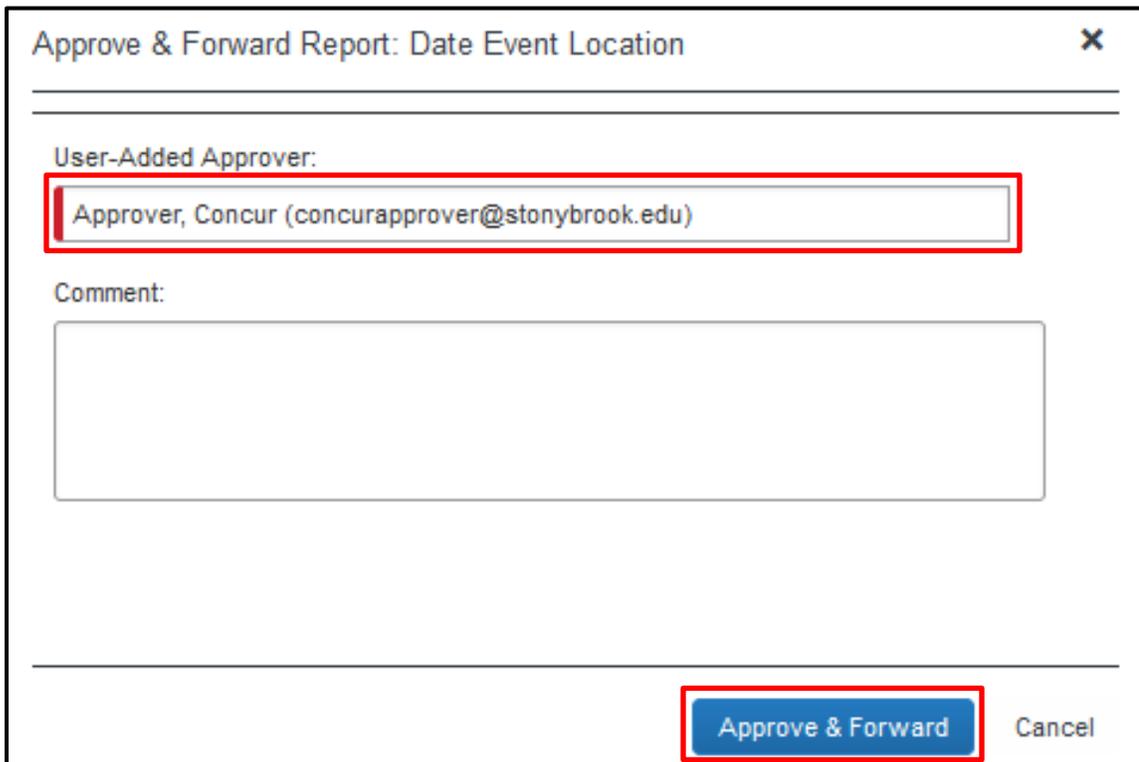
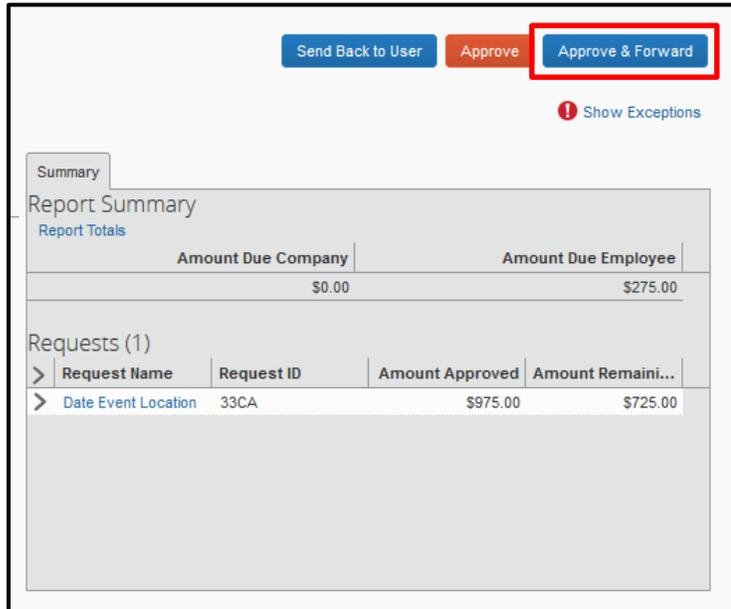
4. If the report is complete and correct, click **Approve**.

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.



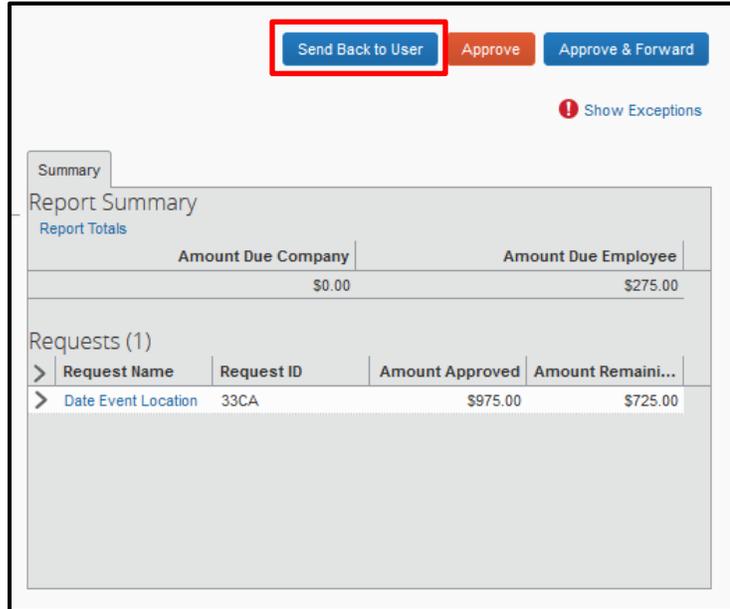
6. Click **Approve & Forward** to approve the expense report and then send it on to the next approver.

Sending Back an Expense Report

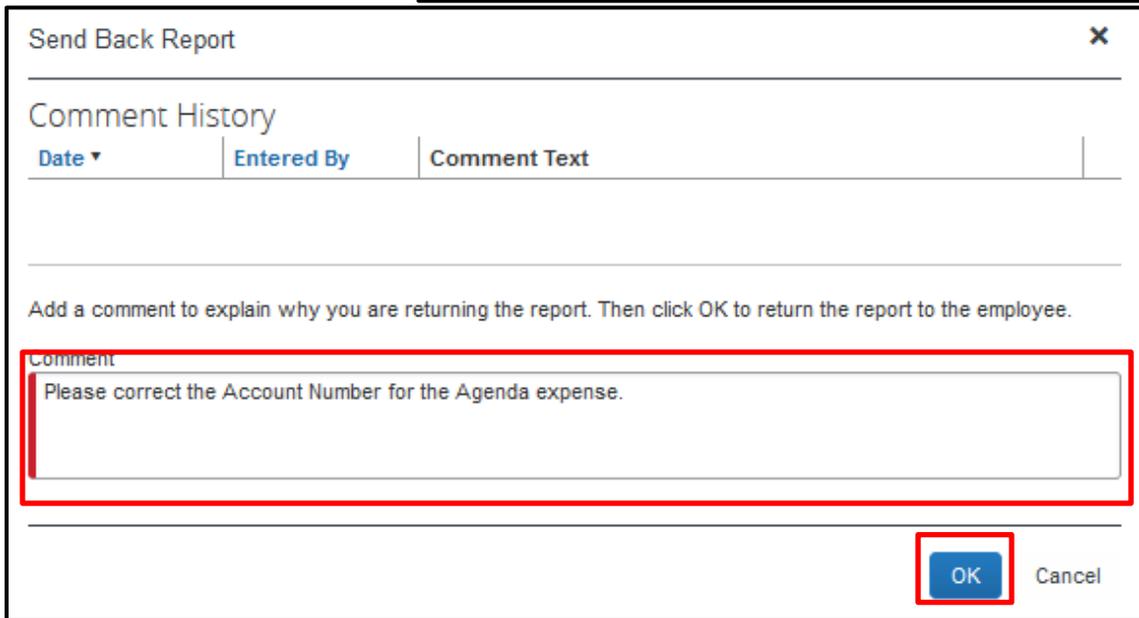
As an approver, you are required to send back an expense report to your employee for correction if you find errors in the report or if it violates policy in some way.

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 page. At the top, there are three buttons: 'Send Back to User' (highlighted with a red box), 'Approve', and 'Approve & Forward'. Below these buttons is a 'Show Exceptions' link with a red exclamation mark icon. The main content area is titled 'Report Summary' and contains a table for 'Report Totals' and a table for 'Requests (1)'. The 'Report Totals' table shows 'Amount Due Company' as \$0.00 and 'Amount Due Employee' as \$275.00. The 'Requests (1)' table has one row with 'Request Name' as 'Date Event Location', 'Request ID' as '33CA', 'Amount Approved' as '\$975.00', and 'Amount Remaini...' as '\$725.00'.



The screenshot shows the 'Send Back Report' dialog box. It has a title bar with 'Send Back Report' and a close button. Below the title bar is a 'Comment History' section with columns for 'Date', 'Entered By', and 'Comment Text'. Below this is a text area for entering a comment. The text area contains the text: 'Please correct the Account Number for the Agenda expense.' Below the text area are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

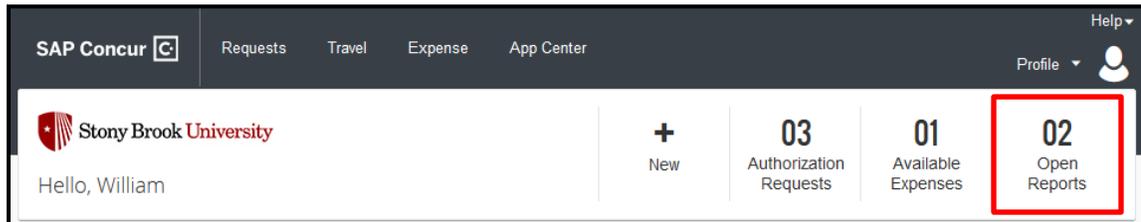
6. Click **OK** to return the report.

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.

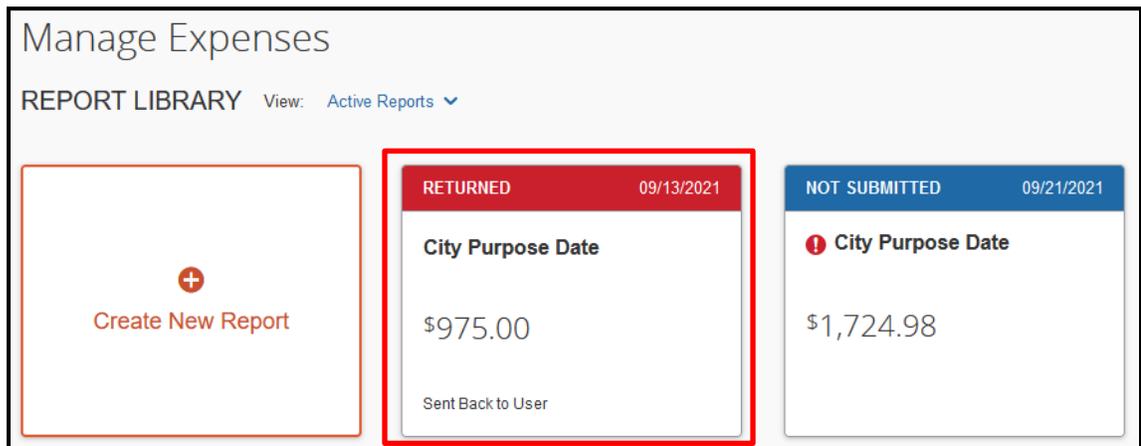
To correct and resubmit an expense report

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.