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I. Log on to Concur

Using a web browser, go to the following website: <u>https://www.concursolutions.com</u>

Enter your username as your 9-digit Stony Brook ID Number followed by @stonybrook.edu (for example: 123456789@stonybrook.edu).



Click on Sign in with SBU NetID Single Sign On

1K C	< Sign In
	123456789@stonybrook.edu
	Sign in with SBU NetID Single Sign On
	Need support or not yet a Concur customer?
	NetID Single Sign On
-	o Concur Travel and Expense enter your NetID and NetID Password me

NELID 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?					

II. Confirm Your Profile Settings

Once you have <u>logged</u> onto <u>Concur</u>. Click on Profile at the top right side of your screen to confirm your settings.

SAP Concur 💽 Requests Travel	Expense Approvals Reporting*	App Center			Administ	ration • Help •
Hello, Traveler		+ New	00 Required Approvals	00 Authorization Requests	00 Available Expenses	00 Open Reports
MY TRIPS (0)	ALERTS A a The Research Foundation of the So Course More and Addume burget two Tou haven't signed up to receive e-receip COMPANY NOTES Welcome to Concur Travel & Eligence for Please visit the SBU Travel Wability for pol	sta 🕼 Sign up he Stony Brook Univ Icy information	era versity	t. you are eligible for	a free Tripit Pro su	ibsonption.
	Direct any inquires to: sbu_travel_expense Sale Travelst MY TASKS Required Approvals Great You currently have no approvals.	00 You curren	Available Expe		OO Open R	
	Ø	expenses	0		C	>
SAP					SAP Co	ncur 🖸

1. Please **verify** that your Supervisor on record is correct. This information is sourced through PeopleSoft; therefore, if the name is incorrect your correct Supervisor will need to consult with your VP Coordinator who will resolve the matter with HR.

Note that your Request Approver is the same as your Expense Approver.



Request Approvers	
Default approver for your Requests	
Jane.Doe@stonybrook.edu - Jane Doe	

2. Please **verify** your email address to be able to forward receipts to

receipts@concur.com. Administration -SAP Concur 🖸 Requests Travel App Center Expense Approvals Reporting -Profile • Profile Personal Information Change Password System Settings Concur Mobile Registration Your Information Profile Options Personal Information Select one of the following to customize your user profile. Company Information Contact Information Personal Information System Settings Email Addresses Personal Information Which time zone are you in? Do you prefer to use a 12 or 24-hour Request Settings Request Information clock? When does your workday start/end? Expense Delegates Delegates are employees who are allowed to perform work on **Request Preferences** Select the options that define when you receive email notifications behalf of other employees. Request Delegates Prompts are pages that appear when you select a certain action, Request Preferences Request Approvers Expense Preferences such as Submit or Print. Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, Change Password Favorite Attendees such as Submit or Print. Change your password. International Travel

How do I verify my email address?

- 1. Once you've added an email address, select Verify.
- 2. You will be sent a verification email. Locate the code included in the email.
- 3. In your SAP Concur solution, enter the code into the Enter Code field next to the email address you're verifying.
 - 4. Click **OK** to complete verification.

Email Addresses	1				Go to top			
Please add at least one email address.								
How do Ladd an email address?								
How do I verify	How do I verify my email address?							
Why should I v	erify my email address?							
lf I am a travel	arranger or delegate, what do I need to do?							
I would like to I	have someone arrange travel or delegate expense	on my behalf, what do I need to o	to?					
	Add an email address							
	Email Address	Verification Status	Verify	Contact?	Actions			
Email 1	john.smith@stonybrook.edu	Verified	Disable Verification	Yes	۷			

3. If you use an alternate work email address, please be sure to **add** and **verify** that address to your profile.

How do I add an email address?

- 1. Select Add an email address below.
- 2. Enter your email address.

- 3. Select **Yes** to have SAP Concur travel notifications sent to that email account.
- 4. Click **OK** to save.

Email Addresse	es				Go to top			
Please add at le	east one email address.							
How do I add an email address?								
How do I veri	fy my email address?							
Why should I	verify my email address?							
Travel Arrang	<u>ers / Delegates</u>							
					Add an email address			
	Email Address		Verify	Contact?	Actions			
Email 1	john.smith@stonybrook.edu	Not Verified	Verify	Yes	L			
	Enter email address	Contact for Travel Notifications?		OK Cancel				
	john.smith@stonybrookmedicine.edu	• Yes O No		Ù				

III. View your Unsubmitted P-Card Report

Click on the Expense tab on the black menu bar

_									Administ	ration - I Help -
SAP Concur 🖸	Requests	Expense	Approvals	Reporting -	App Cente	ər				Profile 🝷 💄
Stony Brook Un	iversity				∔ Start a Request	➡ Start a Report	↓ Upload Receipts	DO Authorization Requests	DO Available Expenses	O pen Reports
COMPANY NOTES										
Welcome to Concur Travel & Expense for Stony Brook University Please visit the SBU Travel Website for policy information. Direct any inquiries to: sbu_travel_expense@stonybrook.edu Safe Travels!										
TASKS										
Open Req	uests			00 Ava	ailable Expens	es	→	02 Open Re	ports	→
User currently has no act	ive requests.		U	ser currently ha	as no available ex	penses.		05/07 P-CARD STMT 2 \$690.85	2022 05/07 - 06/06	

Click on the Purchasing Card Statement Report to open it

SAP Concur 🖸	Requests	Expense	Approvals	App Center			
Manage Expenses	/iew Transactions				•		
Manage Exp	enses		_				
REPORT LIBRAR	Y View: <u>Activ</u>	<u>ve Reports</u>	~]				
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Not Submitted Report Details Print/Share	Manage Receipts 🗸						
Add Expense Edit							
☐ Alerts ↑↓ Receipt ↑↓ P	°ayment Type †↓	Exp	ense Type †↓	Vendor Details ↑↓		Date 😇	Requested ↑↓
- () S	State P-Card	Unc	lefined	NUSIL TECHNOLOGY	LLC	05/25/2022	\$620.89
D D S	State P-Card	N	lefined	THE HOME DEPOT #12	265	05/20/2022	\$69.96
		13					\$690.85

A statement report will be automatically created for each month that you made a credit card transaction. Each statement report will only contain the transactions posted within the dates shown in the title of the report.

If transactions are missing, please make sure you give the system a few days to receive this information from the credit card company. Otherwise, contact the Travel and Card Program Office if transactions are missing.

IV. Attach Required Receipts

Click on each credit card transaction to view its details.

Click on the *Receipt* tab to upload an image of your receipt/invoice.

Please be advised that you can email receipts to your account by email forwarding receipts to <u>receipts@concur.com</u> or using the Concur mobile app.

Details	Itemizations				Hide Receipt			
Expense Type *		* Requir	red field	Receipt	Card Receipt			
Undefined			~					
Transaction Date		Posted Date						
05/20/2022		2022-05-23 Enter Vendor Name THE HOME DEPOT #1265						
мсс								
5200								
	/	Order Received Date						
		MM/DD/YYYY						
Reason Order Has No	ot Arrived	Payment Type						
None Selected	~	State P-Card		Upmad I	Receipt Image			
Amount		Currency						
69.96		US, Dollar						
Business Purpose *								

	Attach Receipt	ث
05/20/2022 THE HOME DEPO Details Ite Expense Type * Undefined Transaction Date 05/20/2022 MCC		Hide Receipt
5200 Reason Order Has Not Arrived	THE HOME DEPOT #1265 Order Received Date MM/DD/YYYY Payment Type	B
None Selected	State P-Card Currency	Upload Receipt Image
69.96 Business Purpose *	US, Dollar	

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🐥 Downloads	SKM_80822060315121.pdf	6/3/2022 3:26 PM	Adobe Acrobat Docu					
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	File name: invoice.pdf	~ Custo						
			Open Cancel					
			ii. 4					

V. Provide Required Purchase Information

1. Use the drop-down menu to select the appropriate Expense Type

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pense Type *		* Required field	Receipt	Card Receipt
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raudulant Transaction			1 / 1 - + 🔊	± 🖷
lospital Event				
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lasfaanian al Manakaankia	MM/DD/YYYY	·	CUSTOMER PICKUP #1 MERCHANDISE AND SER STOCK MERCHANGES TO BE FICED #7 NOV & MERCHANGES TO BE FICED #7 NOV & SECURITY ON COSCIENTS	atomer Pickup I Mill Call
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ount	Currency		TU PULLED ODER NO.	
9.96	US, Dollar		WLOGL MECHANGER STATE WE define with the date for Tage set. HE Calling with the date for Tage set. HE Calling with the date for Tage set.	CALL
Business Purpose *			PROCEED TO WE	L CALL OR

2. Enter the Order Received Date

If your order does not arrive before your submitted certification packet is due, please use the dropdown menu to select the reason your order has not arrived (and be sure to follow up with the vendor accordingly).

Details	Itemizations								Hide Receipt
Expense Type *						,	* Requir	ed field	Receipt Card Receipt
Office Supplies								~	1/1 − + 数 🛓 🖶 🗄
Transaction Date		Posted	Date						
05/20/2022		2022	-05-23					10	SPECIAL SERVICES CUSTOKER INVOICE Pay 141 No. H1285-212722
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5200		THE	HOME	DEP	OT #1	265			Importantion Section REFERENT Important max max Important max Balandardown
			Received						
Reason Order Has Not A	Arrived	<		May		2022	2	>	INTERNAL POINT AND
None Selected	~	Su	Мо	Tu	We	Th	Fr	Sa	A 50 000 EPENJE POLICE. A 50 0000 EPENJE POLICE. Tok here depet sources for gets bird, dwy starse. Peaks not Poly and Poly Berling. Tok here depet sources for gets bird, dwy starse. Peaks not Poly and Poly Berling.
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69.96		8	9	10	11	12	13	14	NLOCKERNINGEN WARDEN FOR ILL CALL Michael and Welling and an internet MICCIDE DY MIL CALL OF MICCIDE DY MIL CALL OF
Business Purpose *		15	16	17	18	19	20	21	
		22	23	24	25	26	27	28	
		29	5	31	1	2	3	4	
		5	6	7	8	9	10	11	

Details	Itemizations		
L		* Requ	ired field
Expense Type *			
Office Supplies			~
Transaction Date		Posted Date	
05/20/2022		2022-05-23	
MCC		Enter Vendor Name	
5200		THE HOME DEPOT #1265	
		Order Received Date	
		MM/DD/YYYY	
Reason Order Has Not Ar	rived	Payment Type	
None Selected	~	State P-Card	
, None Selected		Currency	
Backorder (will follow u	p)	US, Dollar	
Cancelled Order (will fo	S 1		
Fraudulent Transaction	(Disputed Transaction)		
Lost (will follow up)			la la

3. Provide the Business Purpose

Fill in your Business Purpose for the transaction (*why* you purchased the item(s), not what you purchased) and then click Save Expense.

Note that you can upload additional supporting documents to the Receipts area (such as written approvals or lists of attendees) by clicking the Append button.

Transaction Date	Posted Date	
05/20/2022	2022-05-23	SPECIAL SERVICES CUSTOMER INVOICE Page 141 No. H1265-212722
мсс	Enter Vendor Name	 Provide Adventicade voltations introduce Introduce adventicade voltations introduce Introduce adventicade voltation Introduce adventicade voltation Introduce adventicade voltation The Previous adventicade voltation
5200	THE HOME DEPOT #1265	mer 13 HD (Sina man) energy Bog Bog Bog Bog (Sina (Sing Sing) Bog Bog Bog Bog Bog Bog Bog Bog Bog Bog
	Order Received Date	CUSTOMER PICKUP #1 MERCHANDISE AND SERVICE SUMMARY
	MM/DD/YYYY	EVEN BEFORE ALL AND ALL A
Reason Order Has Not Arrived	Payment Type	TOTAL CHARGES OF ALL MERCHANDISE & SERVICES
None Selected ~	State P-Card	A 90 DWS DEFAULT POUCY; SHEETS TAKE DECK A 90 DWS DEFAULT POUCY; SHEETS TAKE DWS DECK TOTAL SHEETS TAKE DWS DOOR
Amount	Currency	The tends Just sense to regist to it it is any source. Now an it's specified by Street to state.
69.96	US, Dollar	NLOL MECONGREGATION AND THE OWNER OF THE OWNER OWNE
Business Purpose *		
Bin used to store extra supplies for ER Ex	am Room 5A.	
		invoice pdf
Save Expense Cancel		Detach Append

VI. Submit your P-Card Statement Report

Checklist before submitting a report

- 1. The SBU Travel and Card Program Office will remind you of the deadline for submitting your completed monthly P-Card Statement reports.
- 2. Confirm that all required information and receipts for each of your transactions have been completed.
- 3. Certify on the SUNY Certification System

You may then click on the *Submit Report* button.

P-CARD STMT 2022 05/07 - 06/06 \$690.85 the Not Submitted Report Details ~ Print/Share ~ Manage Receipts ~							
Add	Expense						
	Alerts↑↓	Receipt †↓	Payment Type ↑↓	Expense Type ∱↓	Vendor Details ↑↓	Date =	Requested ↑↓
	çe		State P-Card	Equipment	NUSIL TECHNOLOGY LLC	05/25/2022	\$620.89
	Ģ		State P-Card	Office Supplies	THE HOME DEPOT #1265	05/20/2022	\$69.96
							\$690.85

After you accept the P-Card Electronic Agreement by clicking on the *Accept & Continue* button, your supervisor (sourced through the HR system) will receive an email notifying them that their approval is required.



VII. Monitor the Approval Process

To monitor the approval process, you can click on *Report Details* and select *Report Timeline*.

P-CARD STMT 2022 05/07 - 06/06 \$690.85								
Report Details 🗸 Print/Share 🖌 Manage Receipts 🗸								
Report	Edit							
Report Header Report Totals	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓					
Report Timeline		State P-Card	Equipment					
Linked Add-ons Manage Requests		State P-Card	Office Supplies					



VIII. Supervisor Approval

To approve, your Supervisor will log onto Concur and click on the Approvals tab.

_	_					Administration - Help -
SAP Concur	C• Requests	Expense	Approvals Reporting -	App Center		Profile 👻 😞
Approvals Home	Requests	Reports				
Approvals Home	Requests	Reports				
Approva	s					
00 Requests	00 Expense Reports	01 Statement Reports				
Statement Rep	orts	- fm				
Report Name			Employee	Card Program Name	Statement Close Date	Requested Amount
P-Card Statemen Statement Report 1	<u>t 05/07 - 06/06</u> for Period 05/07 - 06	/06	PCardholder, Peter	P-Card	06/06/2022	\$690.85