SAP Concur Guide

Created by Jiana Capone, June 2023

This guide is meant to be a resource to help faculty & staff submit expense reports/reimbursements.

Important points:

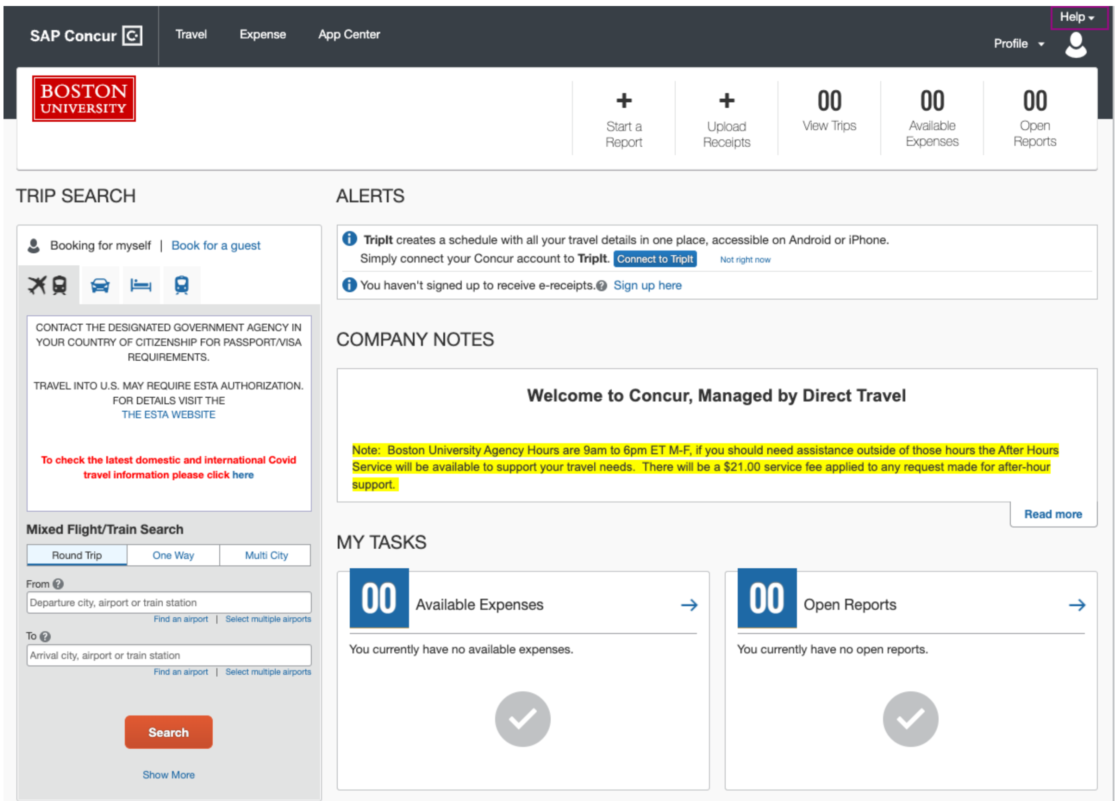
- Enter the correct cost object in the report header.
- If you are charging to a grant, you need to provide a brief justification as to how the expense is related to the grant.
- Every expense needs an *itemized* receipt.
    - Receipts must show proof of payment (i.e. not just an invoice)
    - If you lose a receipt, you must attach the Missing Receipt Affidavit
- Always add a comment on each expense to describe what it was for.
- Reimbursements should only be submitted on your profile if it's for you. Reimbursements for students and guests should be sent to Jiana with the guest form.

Sections:

Log into SAP Concur

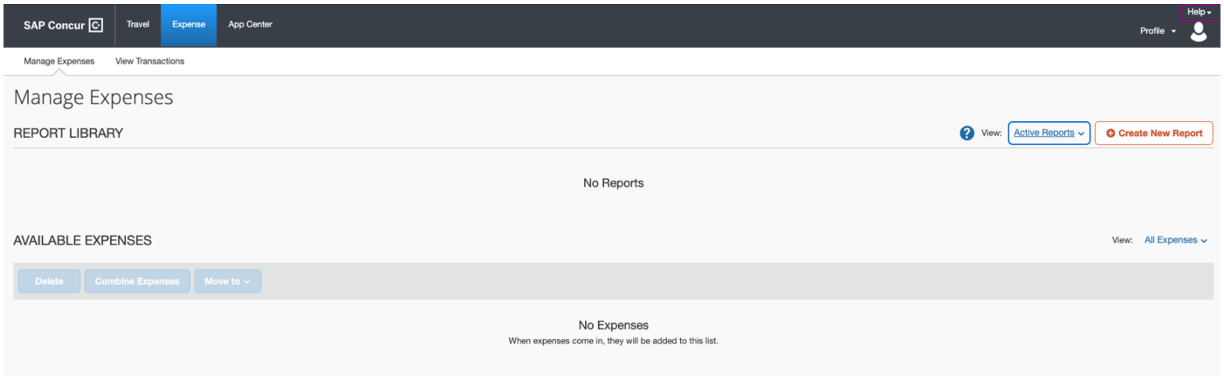
1. Log into BUworks Central Portal: https://ppo.buw.bu.edu/
2. Go to the *Employee Self Service* tab
3. Select *Travel and Expense Reimbursements*
4. Select Manage Business Travel Arrangements and Reimbursements
5. Follow the prompts to login with your Kerberos username and password

SAP Concur Homepage:



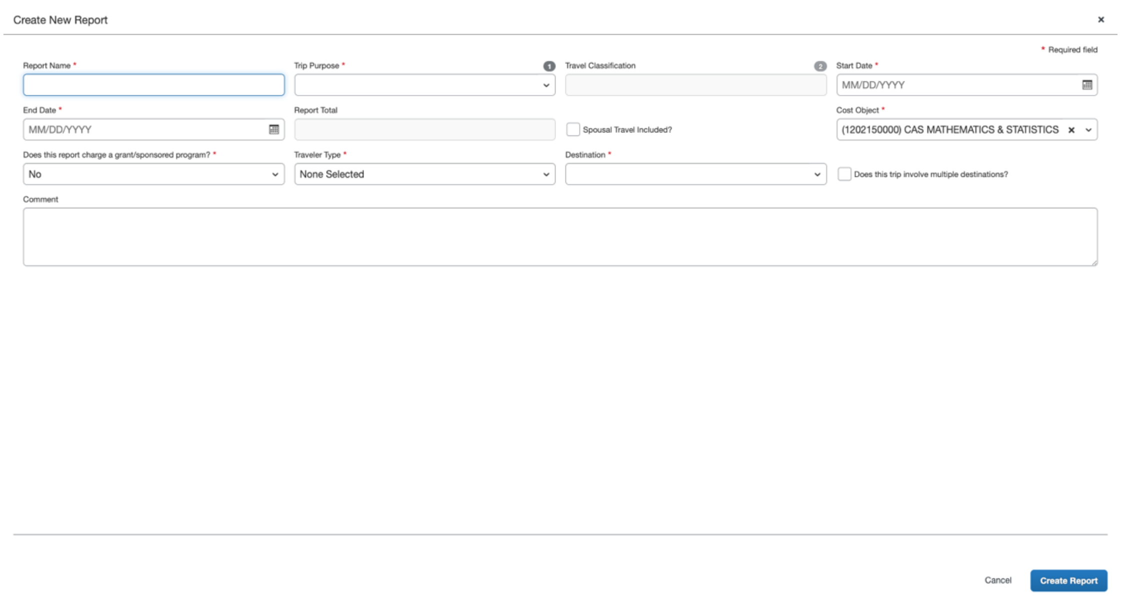
Creating a New Report

1. On the homepage, select *Open Reports,* either top right or bottom right will take you to the same place
2. You are brought to the *Manage Expenses* page that looks like this:



3. Select *Create New Report* on the right side of the page.

4. A window pops up that looks like this:



5. Fill in the required fields.
   a. For the report name, I usually do something along the lines of "JSM Conf May 2023." The system is a bit picky and won't let you add dashes or special characters.
   b. Note that the cost object defaults to the account for the department's operating budget. Most of your expenses will <u>not</u> be charged to this account, so you want to make sure you **enter the correct cost object** here (a startup, a grant, etc.). It's

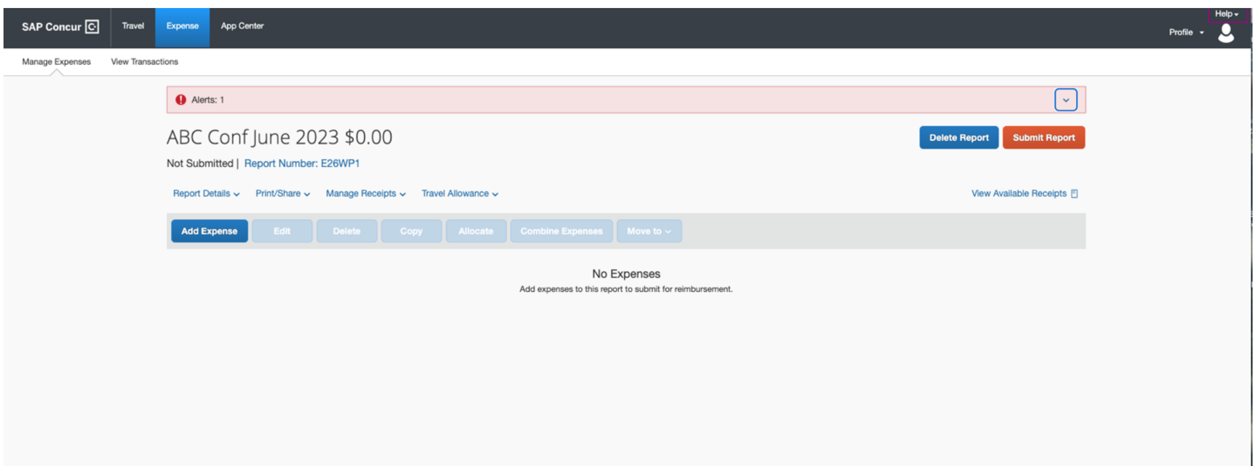
important to know the account number/cost object for any funds you have with BU.

   i. For any accounts that begin with a 9 (usually grants), enter 00 before the cost object for Concur to recognize it. It should read 009……

c. **If you are charging to a grant, be sure to select 'yes' on the "Does this report charge to a grant/sponsored program" dropdown.** If you are charging to BU funds (ex. a startup account), you should select 'no'.

d. In the comment section, clearly explain what this expense report is for. Example: "This expense report is to reimburse my travel expenses to the JSM Conference in May 2023. This will be reimbursed from my startup account." **If you are charging to a grant, you need to provide a brief justification as to how the expenses are relevant to the grant.**

6. When you create the report, you will see a page that looks like this:

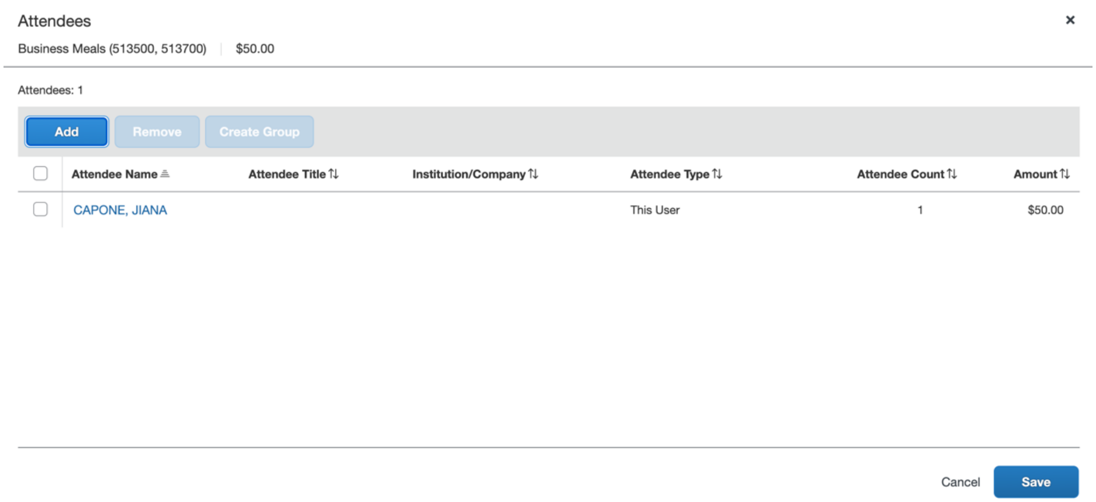


a. To add expenses to the report, select "Add Expense." You will be prompted to select the expense type from a drop down menu (airfare, accommodations, business meal, etc).

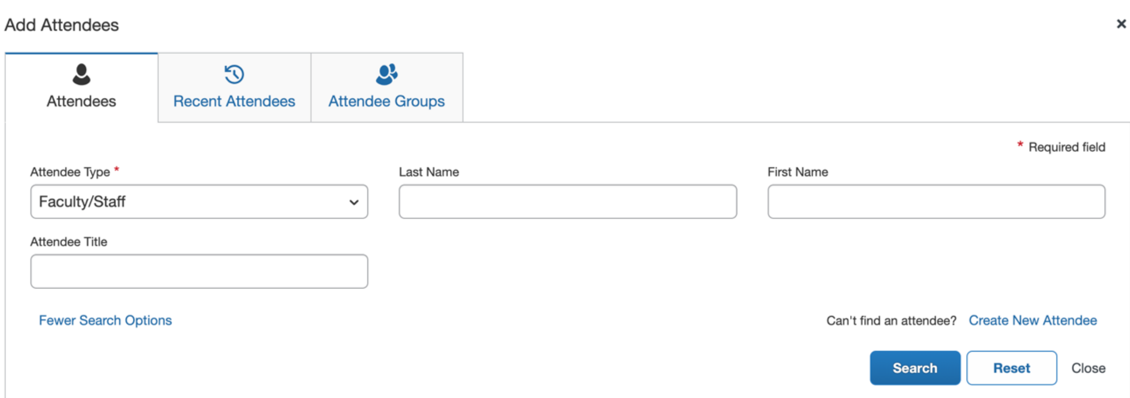
b. Concur will then prompt you to add the information needed for that type of expense. Most of the expense types will require the same information – **itemized** receipt, date of purchase, city of purchase, amount, and currency. You should **always add a comment to describe what the expense was for**. Even if it's as basic as "This expense is for my roundtrip airfare to Seattle for the conference." Adding as much context as possible helps the people approving the report. *They can't approve an expense report that they are confused about.*

Adding Business Meal Attendees

1. When creating a business meal, you are required to include the list of attendees. On the top left corner, select the "Attendees" link.



2. Select the "add" button in the top left. You will see the following screen:



   a. The "Attendees" tab is a way to search attendees that you have added in the past. If you haven't added someone before, you can select the "Create New Attendee" link in the bottom right corner and add their information.
   b. The "Recent Attendees" tab shows a list of recent attendees you've had at other business meals. You can just select them from the list to add them.
   c. I don't typically use the "Attendee Groups" tab. I believe it's meant to be a shortcut if you often have business meals with the same group of people, but I usually have a hard time getting it to load so I just add each attendee individually.