

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.

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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:

SAP Concur | Travel | Expense | App Center | Profile | Help

BOSTON UNIVERSITY

+ Start a Report | + Upload Receipts | 00 View Trips | 00 Available Expenses | 00 Open Reports

TRIP SEARCH

Booking for myself | [Book for a guest](#)

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CONTACT THE DESIGNATED GOVERNMENT AGENCY IN YOUR COUNTRY OF CITIZENSHIP FOR PASSPORT/VISA REQUIREMENTS.

TRAVEL INTO U.S. MAY REQUIRE ESTA AUTHORIZATION. FOR DETAILS VISIT THE [THE ESTA WEBSITE](#)

To check the latest domestic and international Covid travel information please click [here](#)

Mixed Flight/Train Search

Round Trip | One Way | Multi City

From Departure city, airport or train station Find an airport | Select multiple airports

To Arrival city, airport or train station Find an airport | Select multiple airports

Search | [Show More](#)

ALERTS

TripIt creates a schedule with all your travel details in one place, accessible on Android or iPhone. Simply connect your Concur account to **TripIt**. [Connect to TripIt](#) Not right now

You haven't signed up to receive e-receipts. [Sign up here](#)

COMPANY NOTES

Welcome to Concur, Managed by Direct Travel

Note: Boston University Agency Hours are 9am to 6pm ET M-F, if you should need assistance outside of those hours the After Hours Service will be available to support your travel needs. There will be a \$21.00 service fee applied to any request made for after-hour support. [Read more](#)

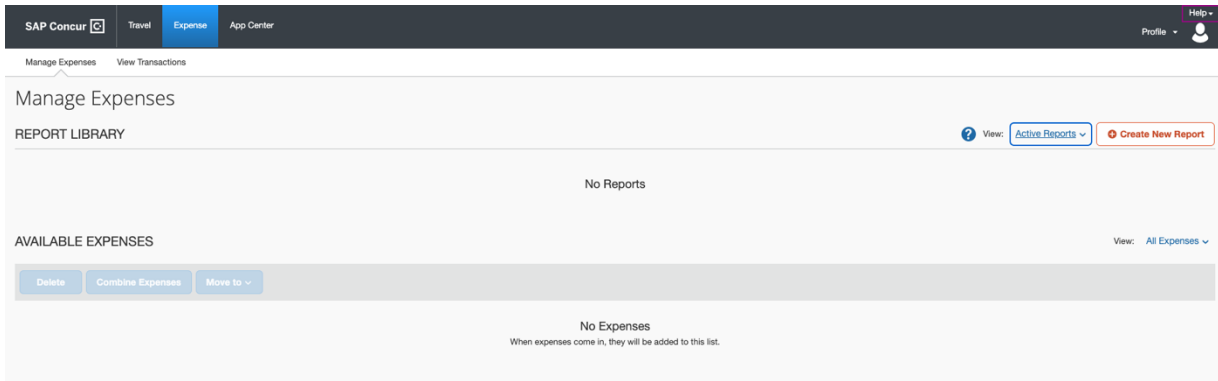
MY TASKS

00 Available Expenses →
You currently have no available expenses. ✓

00 Open Reports →
You currently have no open reports. ✓

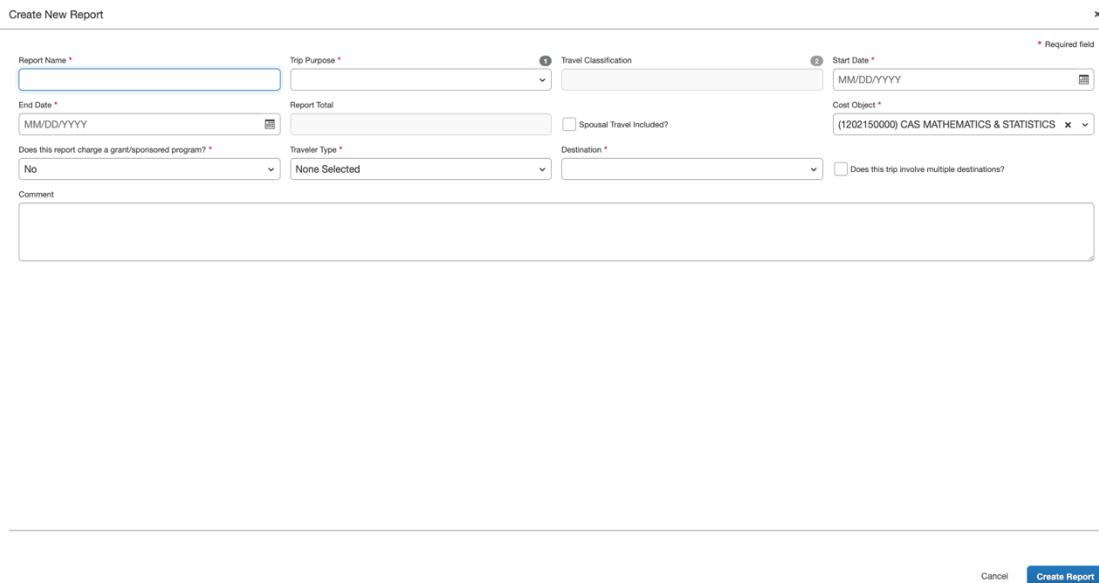
Creating a New Report

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:

The screenshot shows the 'Create New Report' form. It contains several required fields: 'Report Name', 'Trip Purpose', 'Travel Classification', 'Start Date' (MM/DD/YYYY), 'End Date' (MM/DD/YYYY), 'Report Total', 'Cost Object' (defaulting to '(1202150000) CAS MATHEMATICS & STATISTICS'), 'Does this report charge a grant/sponsored program?' (No), 'Traveler Type' (None Selected), 'Destination', and 'Does this trip involve multiple destinations?'. There are also checkboxes for 'Spousal Travel Included?' and 'Does this trip involve multiple destinations?'. A 'Comment' text area is located at the bottom. The form has 'Cancel' and 'Create Report' buttons at the bottom right.

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 not 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

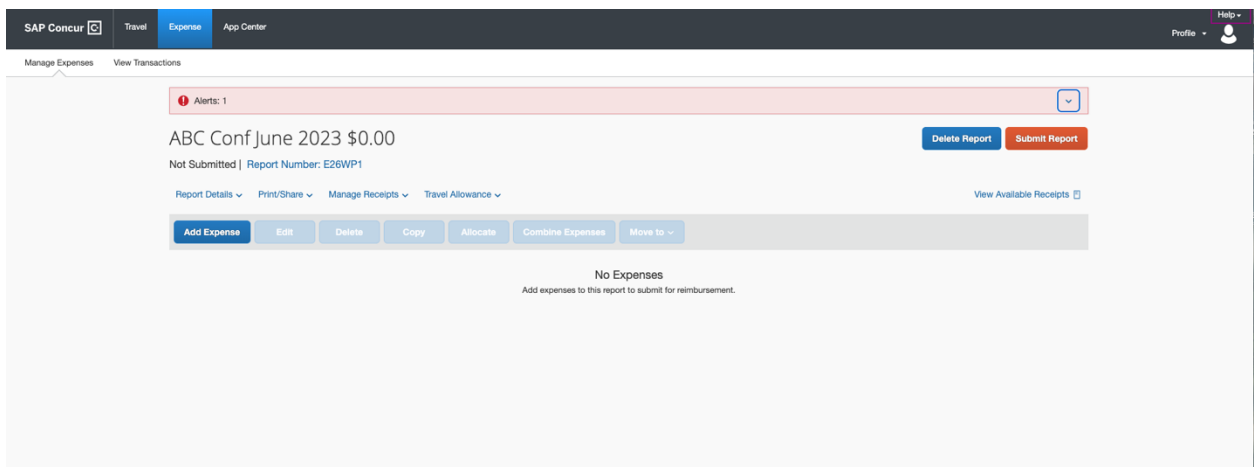
important to know the account number/cost object for any funds you have with BU.

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.

The screenshot shows a modal window titled "Attendees" with a close button (x) in the top right corner. Below the title, it displays "Business Meals (513500, 513700) | \$50.00". A sub-header indicates "Attendees: 1". There are three buttons: "Add" (highlighted in blue), "Remove", and "Create Group". Below these is a table with the following columns: "Attendee Name", "Attendee Title", "Institution/Company", "Attendee Type", "Attendee Count", and "Amount". One row is visible with the following data: "CAPONE, JIANA", an empty field, "This User", "1", and "\$50.00". At the bottom right, there are "Cancel" and "Save" buttons.

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

The screenshot shows a modal window titled "Add Attendees" with a close button (x) in the top right corner. It features three tabs: "Attendees" (selected), "Recent Attendees", and "Attendee Groups". The form includes a dropdown menu for "Attendee Type" (set to "Faculty/Staff"), and input fields for "Last Name" and "First Name". A "Attendee Title" field is also present. A red asterisk indicates that "Attendee Type" is a required field. At the bottom, there is a "Fewer Search Options" link, a "Can't find an attendee? Create New Attendee" link, and "Search", "Reset", and "Close" buttons.

- 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.