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

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601 108th Avenue, NE, Suite 1000
Bellevue, WA 98004
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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.
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**.

   ![Start a Request](image)

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**.

   ![Create New Request](image)

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.

![SBF-User Electronic Agreement - Request](image)

By clicking Accept, I certify that:

This is a true and accurate estimation of expenses that will be incurred in the performance of my official duties and is in compliance with applicable travel policies.

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.

![Manage Requests](image)

Managing Requests
Request Library

London
03/12/2024 | 3RDW

$1,250.00

Submitted

Submitted & Pending Approval
International Travel (NYS Policy, Div.)
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.

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.