Table of Contents

I. Log on to Concur ................................................................. 2
II. Confirm Your Profile Settings .................................................. 3
III. View your Unsubmitted P-Card Report .................................... 5
IV. Attach Required Receipts .......................................................... 7
V. Provide Required Purchase Information ..................................... 9
VI. Submit your P-Card Statement Report ....................................... 12
VII. Monitor the Approval Process ................................................ 13
VIII. Supervisor Approval ................................................................ 14
I. Log on to Concur

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

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
II. Confirm Your Profile Settings

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

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

**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.

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.

III. **View your Unsubmitted P-Card Report**

Click on the *Expense* tab on the black menu bar
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 receipts@concur.com or using the Concur mobile app.
V. Provide Required Purchase Information

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

   ![Image of drop-down menu]

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).
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.
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.

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*. 
VIII. Supervisor Approval

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