Table of Contents

Ι.	Log on to Concur	. 2
<i>II</i> .	Confirm Your Profile Settings	. 3
<i>III</i> .	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	1 2
VII.	Monitor the Approval Process	13
VIII	Supervisor Approval	14

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 a	< 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
Login t Please Userna	o Concur Travel and Expense enter your NetID and NetID Password me

Nello Single Sign On					
Login to Concur Travel and Expense					
Please enter your NetID and NetID Password					
Username					
Password					
🗌 Don't Remember Login					
Protected by <u>Duo Security Two-Step Login</u>					
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.

Stony Brook University	Expense Approvats Reporting *	+	00	00	00	Profile •
Hello, Traveler		New	Required Approvals	Authorization Requests	Available Expenses	Open Reports
IY TRIPS (0) →	ALERTS					
ou currently have no upcoming trips.	As a The Research Foundation or the so Learn More and Activitie Tou haven't signed up to receive e-receiv	ate University or pts. @ Sign up he	New York employee	L you are esgible for	a free Tripit Pro su	ibsoription.
	COMPANY NOTES					
	Welcome to Concur Travel & Espense for Please visit the SBU Travel Website for po Direct any inquiries to: sbu_travel_expens Safe Travels!	Stony Brook Univ Iloy Information. e@stonybrook.ec	versity du			
	MY TASKS					
	Great! You currently have no approvals. →	Vou current expenses	Available Expe	enses->	Open R	eports -
	Ø		0		C	
AP					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 Go to top								
Please add at least one email address.								
How do I add an email address?								
How do I verify	How do I verify my email address?							
Why should I v	erify my email address?							
If I am a travel	arranger or delegate, what do I need to do?							
I would like to	have someone arrange travel or delegate expense	on my behalf, what do I need to	do?					
	G 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 Addresses Go to top									
Please add at least one email address.									
How do I add an email address? How do I verify my email address?									
Why should I verify Travel Arrangers / E	<u>my email address?</u>)elegates								
<u></u>					Add an email address				
	Email Address		Verify	Contact?	Actions				
Email 1	john.smith@stonybrook.edu	Not Verified	Verify	Yes	L				
	Enter email address john.smith@stonybrookmedicine.edu	Contact for Travel Notifications? ● Yes ○ No							

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 active requests. User currently has no available expenses. 05/07 P-CARD STMT 2022 05/07 - 06/06 \$690.85										

Click on the Purchasing Card Statement Report to open it

SAP Concur ⓒ	Requests	Expense	Approvals	App Center				
Manage Expenses	View Transaction	ns						
Manage Ex	penses							
REPORT LIBRA	REPORT LIBRARY View: Active Reports V							
+ Create New December 2015 Not Submitted Report Details ~ Print/Share ~	/ Report 2022 05/(Manage Receipts	P: 06 \$() 07 - 06/0	DT SUBMITTED -CARD STMT 5/06 690.85 690.85	05/07/2022 2022 05/07 -		Submit Report		
Add Expense Edit								
☐ Alerts ↑↓ Receipt ↑↓	Payment Type ↑↓	Ex	pense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓		
	State P-Card	Un	defined	NUSIL TECHNOLOGY	LLC 05/25/2022	\$620.89		
	State P-Card	Un	defined	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 Poi 05/20/2022 2 MCC Entropy		Posted Date							
		2022-05-23							
		Enter Vendor Name							
5200		THE HOME DEPOT #1265							
	/	Order Received Date							
		MM/DD/YYYY							
Reason Order Has No	ot Arrived	Payment Type			2				
None Selected	~	State P-Card		Upmad I	Receipt Image				
Amount		Currency							
69.96		US, Dollar							
Business Purpose *									

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

🚱 Open X							
$\leftarrow \rightarrow \land \uparrow$	> This PC > Downloads	v Ū >	Search Downloads				
Organize 🔻 Nev	v folder		:== 🕶 🔳 🕐				
🧢 This PC	^ Name	Date modified	Туре				
🧊 3D Objects	~ Today (7)						
Desktop	🛓 invoice.pdf	6/3/2022 4:11 PM	Adobe Acrobat Docu				
🗎 Documents	🛃 Order_InvoiceJune-3-2022_4:01-PM.pdf	6/3/2022 4:01 PM	Adobe Acrobat Docu				
🐥 Downloads	🛃 SKM_80822060315121.pdf	6/3/2022 3:26 PM	Adobe Acrobat Docu				
Music	🛃 Statement Summary.pdf	6/3/2022 10:52 AM	Adobe Acrobat Docu				
Pictures							
🚪 Videos							
👟 Local Disk (C:)							
	v <		>				
	File names linearies and	Curta	m Files (* page* inge* inge \v				
		~ Custo	in mes (ipng; ijpg; ijpeg 🗸				
			Open Cancel				
			ii. 4				

V. Provide Required Purchase Information

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

Details Itemizations				Hide R
aansa Tursa *		* Required field	Receipt	Card Receipt
ndefined		~		
audulant Transaction			1 / 1 - + Ø	± 0
lospital Event				
ffice Supplies			SPECIAL SERVICES CUSTOMER INVOICE fame USS SOUTH EXAMPLET SERVICES AND PATH SAMPLATE SAMPLATE CASE	Page 1 of 1 No. H1265-212722
ther difference of the second se			SOUTH SETAURET, NY 11720 Reviews: sx995 Were Peter PCardbalder Peter PCardbalder Were1	REPRINT
atient Event/Supplies			erran men Societaria Stary Brock en success Men KY Re Men SUEFOLK	2022-06-83 19:01
infensional Manakanakia	MM/DD/YYYY	•	CUSTOMER PICKUP #1 MERCHANDISE AND SERV Stock MIGD/wakded 10 8E PCK04 for Not #1 Sec # Stock for Sec #1 Sec # Stock for Sec #1	VICE SUMMARY The second is give block the particular free free free free free free free fr
ason Order Has Not Arrived	Payment Type		IN 1 199-19527 201 EXHOLD GALLWIDGHTDEF SCHEDULE PROMP CATE IN 22 MIR TOTAL CHARGES OF ALL MERCHANDISE & SERVICES	A A AGO STATE
one Selected	► State P-Card		Policy M (PR) A: 90 DAYS DEFAULT POLICY; "The Hone Dept reserves the right to limit / dery returns. Presse see the splittly path in	AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA
ount	Currency		THE DOOD FORDER NO. H	852070
9.96	US, Dollar		WILCOLL MICHARDER AND FOR WILL OL	ALL AND
Business Purpose *			PROCEED TO WU	CALLOR

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	Freiter No. H1285-217722
MCC		Enter V	endor Na	ame					The DE SOLVE STRUKT Proc (19) 50-716 SOLVE STRUKT (SV 172) SOLVE STRUKT (SV 172) Revenue SHR SOLVE STRUKT (SV 172) Revenue SHR SOLVE STRUKT (SV 172) Revenue SHR SOLVE STRUKT (SV 172) STRUKT (SV 172) S
5200		THE	HOME	DEP	OT #1	265			Implication Strike Ref PMN1 Implication No No
		Order F	eceived	Date YY					
Reason Order Has Not A	Arrived	<		May		2022	2	>	TOTAL CHARGES OF ALL MERCHANDISE & SERVICES
None Selected	~	Su	Мо	Tu	We	Th	Fr	Sa	Notice of the second se
Amount		1	2	3	4	5	6	7	TO PUTAN MARK MARK
69.96		8	9	10	11	12	13	14	NL CALL REDORDERSHOP NL CALL REDORDERSHOP
Business Purpose *		15	16	17	18	19	20	21	modela i u mu cau on
		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	rrived	Payment Type	
None Selected	~	State P-Card	
None Selected		Currency	
Backorder (will follow u	p)	US, Dollar	
Cancelled Order (will fo	llow up)		
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	Second seconds clistopes analyse Design No. H1265-212722
мсс	Enter Vendor Name	 The USENDA STATE OF THE AT A S
5200	THE HOME DEPOT #1265	Bit Contraction Bit Contra
	Order Received Date	CUSTOMER PICKUP #1 MERCHANDISE AND SERVICE SUMMARY Research (Victoria)
	MM/DD/YYYY	107 107 107 107 107 107 107 107 107
Reason Order Has Not Arrived	Payment Type	TOTAL CHARGES OF ALL MERCHANDISE & SERVICES
None Selected ~	State P-Card	A SU DIST SERVET PROCE. A SU DIST SERVET PROCE. The Name Super Gamma The grints for of Adapt values of the adapt for the adapt. MARKET SIME
Amount	Currency	TUD FUTURDO'OF ORDER NA HORS FUTUR
69.96	US, Dollar	NL OLI MICONFISSION NL OLI MICONFISSION MICOLINA ADDRESSION AND MICONFISSION ADDRESSION MICOLINA ADDRESSION ADDRESSION ADDRESSION MICOLINA ADDRESSION ADDRESSION ADDRESSION ADDRESSION ADDRESSION MICOLINA ADDRESSION ADDRESSION ADDRESSION ADDRESSION ADDRESSION ADDRESSION ADDRESSION ADDRESSION MICOLINA ADDRESSION
Business Purpose *		
Bin used to store extra supplies for ER Ex	am Room 5A.	
		invoice off
Save Expense Cancel		

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							
Report D	Details 🗸	Print/Share	✓ Manage Receipts ✓				
Add	Expense						
	Alerts ↑↓	Receipt↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date =	Requested ↑ ↓
	Ģ		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 V Print/Share V Manage Receipts V									
Report	Edit								
Report Header Report Totals	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓						
Report Timeline		State P-Card	Equipment						
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	2			
Approvals Home	Requests	Reports				
Approva	s					
00 Requests	00 Expense Reports	01 Statement Reports				
Statement Rep	orts	- Jrm				
Report Name			Employee	Card Program Name	Statement Close Date	Requested Amount
P-Card Statemen Statement Report	<u>t 05/07 - 06/06</u> for Period 05/07 - 06	/06	PCardholder, Peter	P-Card	06/06/2022	\$690.85