

**Stony Brook Foundation Concur
International Request
QuickStart Guide**



SAP Concur
Technologies

April 1, 2024

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

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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.


 Stony Brook University
Electronic Record of Authorized Signatures

Accounts ▾ Advanced ▾ Reports ▾ Help ▾ Contact Us Log Out

← Back to List
✓ Save and Confirm
← Previous Record
→ Next Record

Signatory Delegates (Active Record) [Effective as of 1/30/2024 9:35:21 AM]

Along with the **Account Director** listed above, the following **Signatory Delegates** have the authorization to encumber or commit account funds:

Signatory Delegate Name	Stony Brook ID #	WolfMart Approver	Level of Authority <small>If left empty, full authority is assumed.</small>	Signature
✎ Add/Remove Lois A Arens	123456789	Authorized		<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">  A signature is on file for this individual </div>

Other Account Users (Active Record) [Effective as of 1/30/2024 9:35:21 AM]

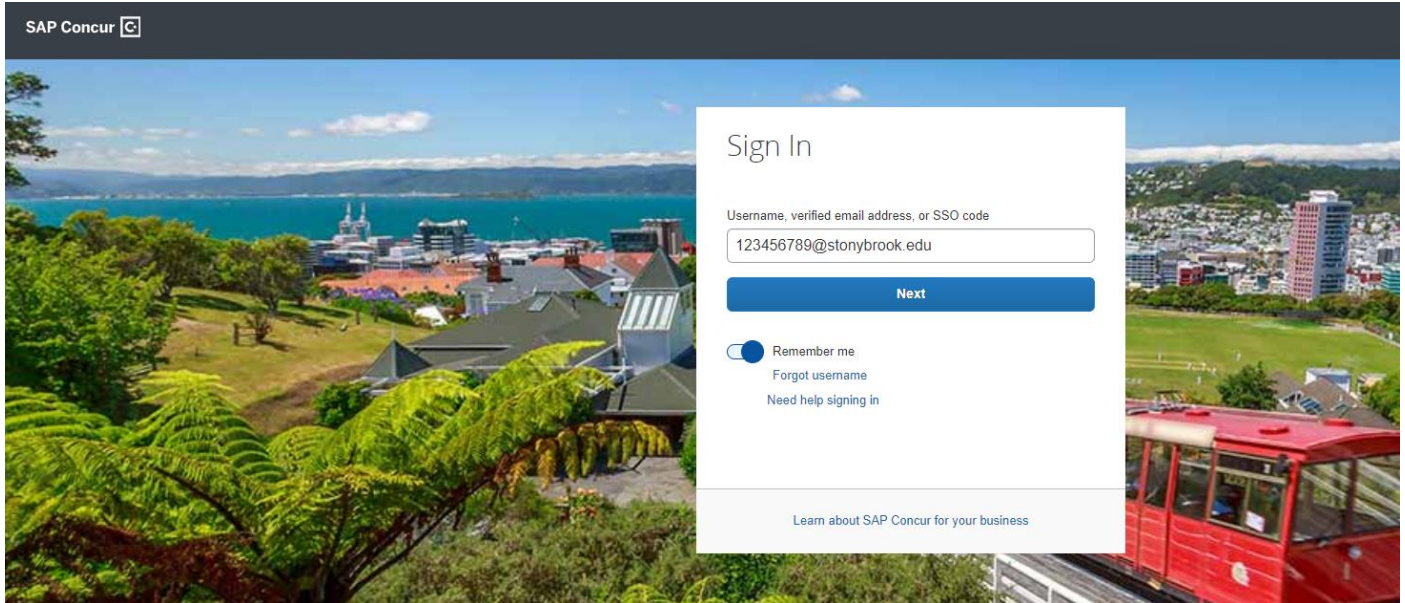
Please identify other account specific users here (e.g., [Account Assistant](#), [Report Recipient](#), [WolfMart Requester](#), [iLab User](#), [Property Control Coordinator](#), [Traveler](#)).

Full Name	Stony Brook ID #	Account User Type
✎ Add/Remove Lois A Arens	123456789	Account Assistant
Lois A Arens	123456789	Report Recipient
David J. Smith	987654321	Traveler

Signing in to SAP Concur

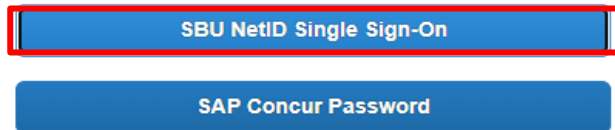
1. To sign in to SAP Concur, on the **Sign In** screen, enter **<your 9-digit Stony Brook ID number>@stonybrook.edu** (example: **123456789@stonybrook.edu**) in the field, and then click **Next**.

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**.

Sign in with:



3. Fill in your NetID **Username** and NetID **Password**

NOTES:

- Your password is case sensitive.
- If you are not able to log in with your NetID, please visit: <https://it.stonybrook.edu/services/netid> for assistance.

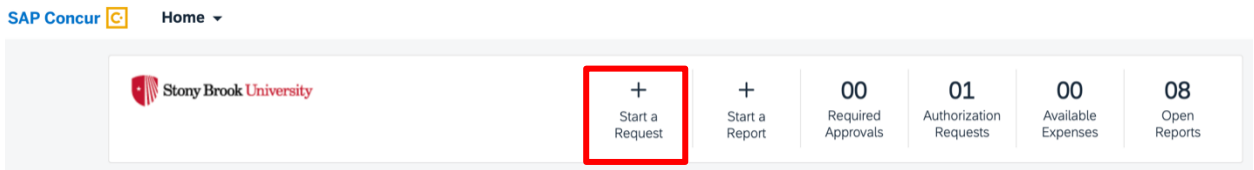


Creating an International Travel Request

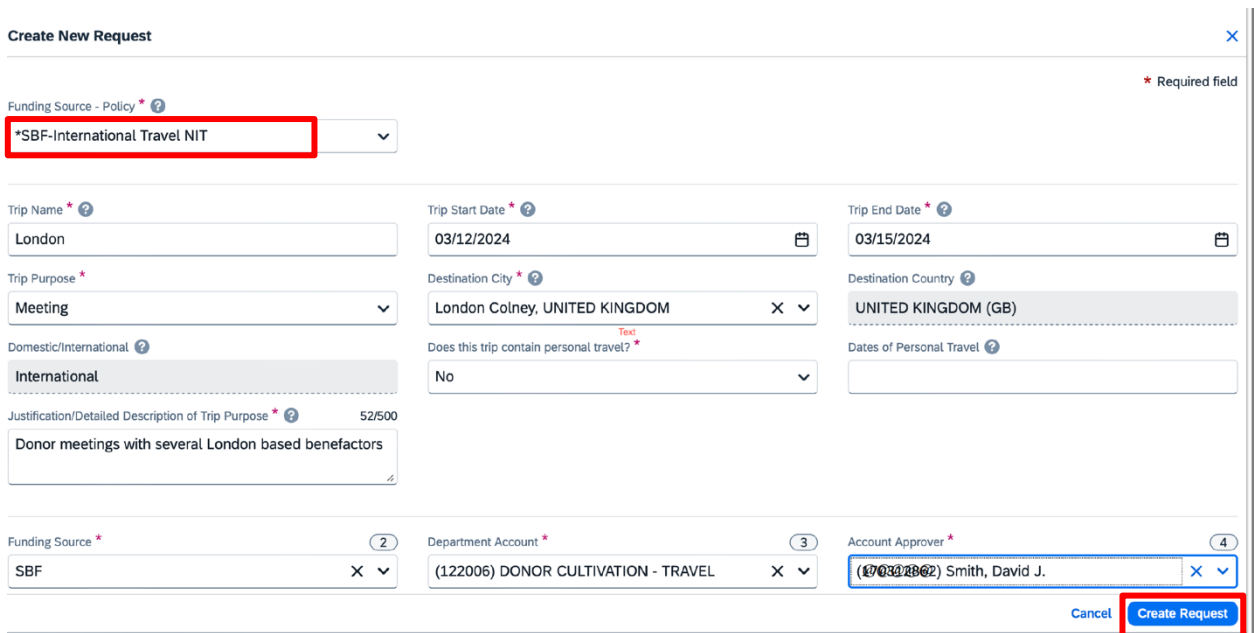
SBF policy requires **all international travelers** to obtain authorization **before** an **International trip** is made. The authorization must be fully approved by the traveler’s supervisor and account manager (cost approver) before the trip starts. Using Concur Request, you can submit an authorization 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

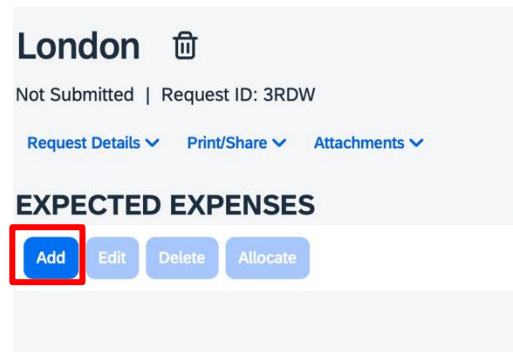
- From the SAP Concur home page, on the **Quick Task** bar, place your mouse pointer over **Start a Request**.



- 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**.



- 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.

Add expected expenses and/or travel plans

Search for an expense type

- ▼ **01. Travel & Transportation Expenses**
 - Airfare
 - Car Rental
 - Train
- ▼ **02. Lodging & Meal Expenses**
 - Lodging

5. On the **New Expense** page, complete the required fields. Click **Save**.

Home / Requests / Manage Requests / London / New Expense: Airfare

New Expense: Airfare

Cancel Save

Round Trip
One Way
Multi City

Outbound

* Required field

From Airport * John F Kennedy Intl (Airport - JFK), New York, New York Date *
03/12/2024 Departure Time
02:00 PM

To Airport * Heathrow (Airport - LHR), London, UNITED KINGDOM Internal Comment
0/2000

Return

Date * 03/15/2024 Departure Time
hh:mm A

Internal Comment 0/2000

Estimated Cost * 1,250.00 Currency *
US, Dollar

Save
Cancel

6. Continue to add any further anticipated expenses to the request.

7. When you are done entering expected expenses hit **Submit Request**.

Home / Requests / Manage Requests / London

London \$1,250.00

More Actions ▼ Submit Request

Sent Back to User | Request ID: 3RDW | [View Timeline](#)

Request Details ▼ | Print/Share ▼ | Attachments ▼

EXPECTED EXPENSES

Add
Edit
Delete
Allocate

	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Airfare	New York (JFK) - London (LHR) : Round Trip	03/12/2024	\$1,250.00	\$1,250.00
					\$1,250.00

- Click **Accept & Continue** to certify the estimates you are submitting and your compliance with the SBF travel policy.

***SBF-User Electronic Agreement - Request**



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.

Cancel

Accept & Continue

- 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

Request Library

London
03/12/2024 | 3RDW

\$1,250.00

Submitted

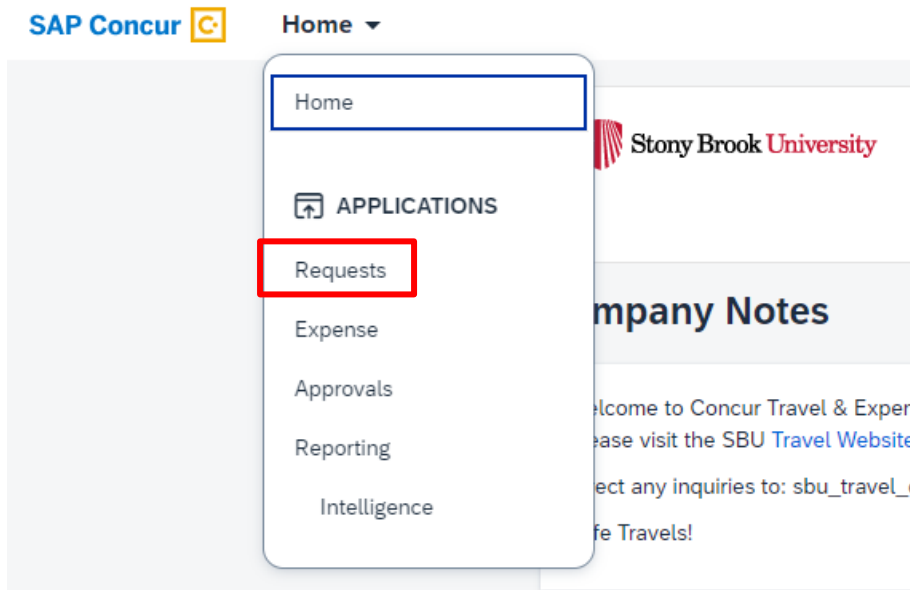
Submitted & Pending Approval
International Travel (NYS Policy, Div.)

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

Home / Requests / Manage Requests

Manage Requests

Request Library View Approved [Create New Request](#)

Request Name ^{↓↑}	Status ^{↓↑}	Request Dates ^{↓↑}	Requested ^{↓↑}	Approved ^{↓↑}	Remaining amount ^{↓↑}
Rome 10.23 ID: 3RCJ	Approved 10/23/2023	10/09/2023	\$3,000.00	\$3,000.00	\$3,000.00

- 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**.

Home / Requests / Manage Requests / Rome 10.23

Rome 10.23 \$3,000.00

Approved | Request ID: 3RCJ

Request Details | Print/Share | Attachments

REPORTS: 2
Remaining \$3,000.00

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Airfare	New York (JFK) - Rome (FCO) : Round Trip	10/09/2023	\$2,000.00	\$2,000.00
Lodging	Rome, ITALY	10/09/2023	\$1,000.00	\$1,000.00
				\$3,000.00

- Add Expenses by clicking on the **Add Expense** tile.

Home / Expense / Manage Expenses / Rome 10.23

Rome 10.23 \$0.00

Not Submitted | Report Number: 0P8D1U

REQUEST
Approved
\$3,000.00

Report Details | Print/Share | Manage Receipts | Travel Allowance | View Available Receipts

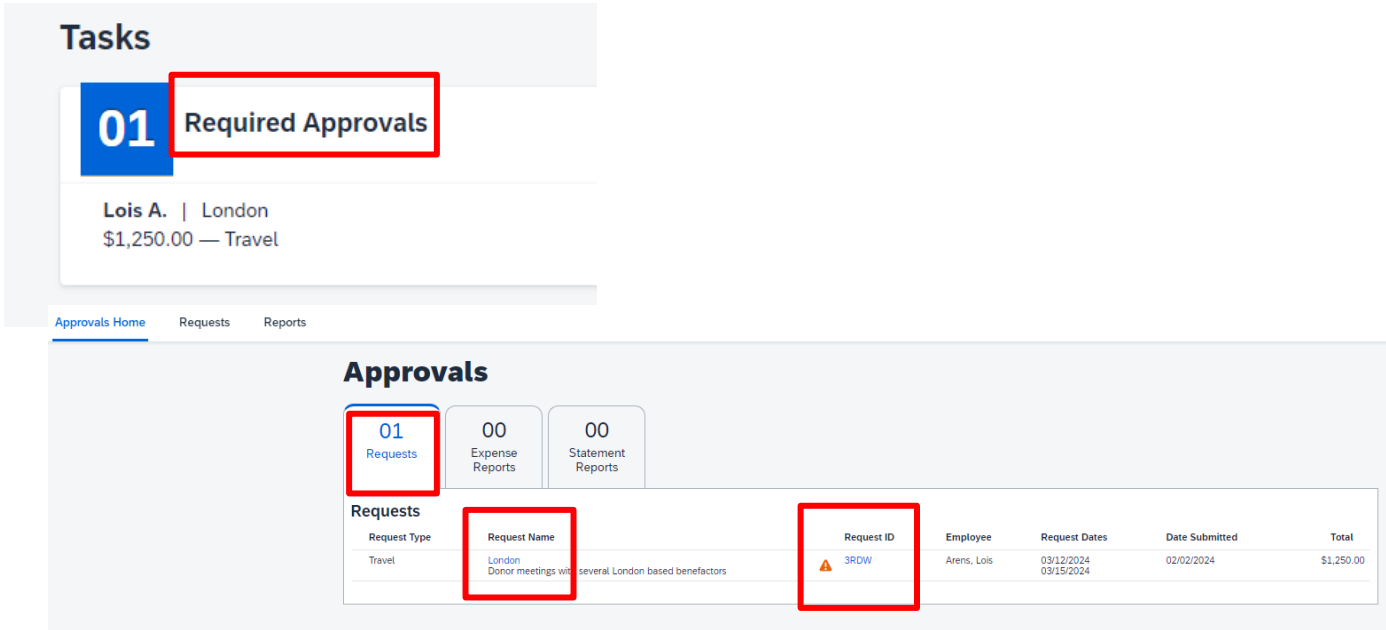
Add Expense | Edit | Delete | Copy | Allocate | Combine Expenses | Move to

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

- From the SAP Concur home page, in the **My Tasks** section, click **Required Approvals**.
On the **Approvals** home page, click **Requests**.



Tasks

01 Required Approvals

Lois A. | London
\$1,250.00 — Travel

Approvals Home | Requests | Reports

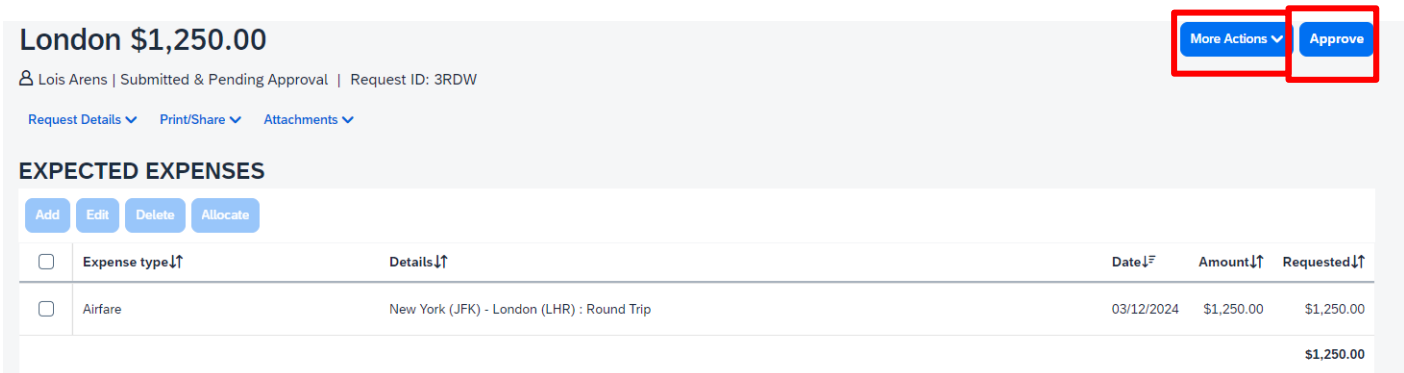
Approvals

01 Requests | 00 Expense Reports | 00 Statement Reports

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	London Donor meetings with several London based benefactors	3RDW	Arens, Lois	03/12/2024 03/15/2024	02/02/2024	\$1,250.00

Click on either the **Request Name** or the **Request ID**.

- 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**



London \$1,250.00

Lois Arens | Submitted & Pending Approval | Request ID: 3RDW

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

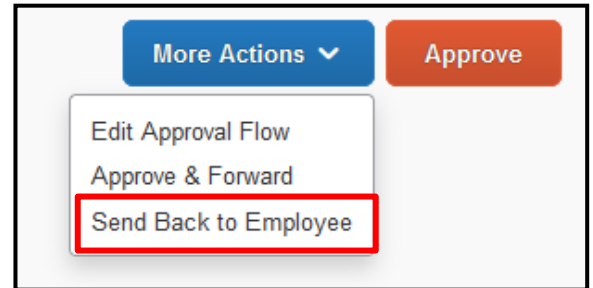
Add | Edit | Delete | Allocate

<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Airfare	New York (JFK) - London (LHR) : Round Trip	03/12/2024	\$1,250.00	\$1,250.00
					\$1,250.00

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.



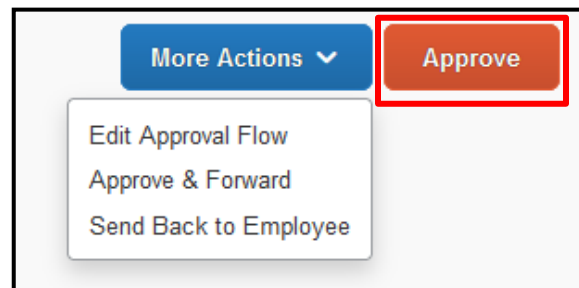
2. In the **Send Back to Employee** window, enter the **Comment**, then click **Send Back**.



To approve the request

1. IF there are no errors or policy violations and no other managers need to review the request, click **Approve**.

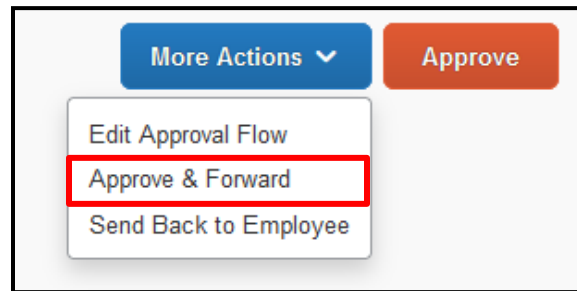
The employee will be notified that the request has been approved and it will no longer appear in your approval queue.



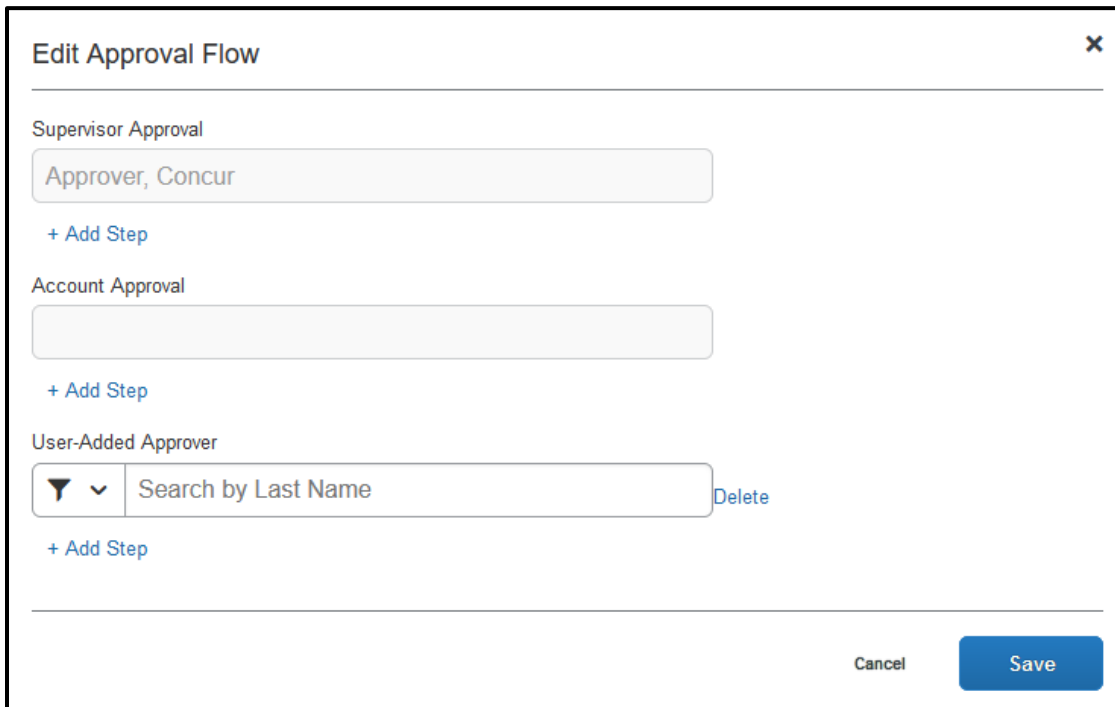
To approve and forward the request to an additional approver

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.



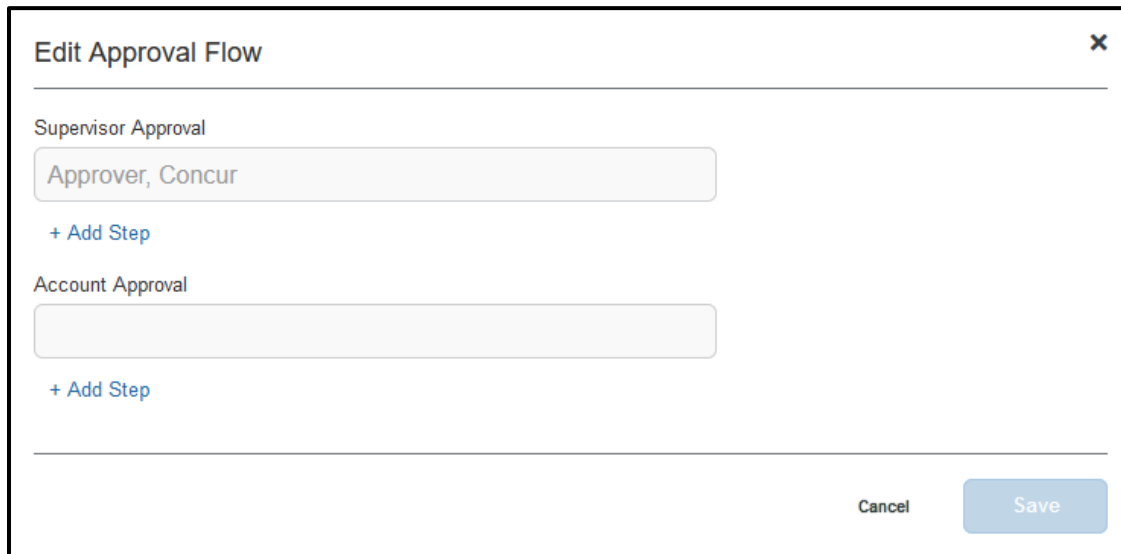
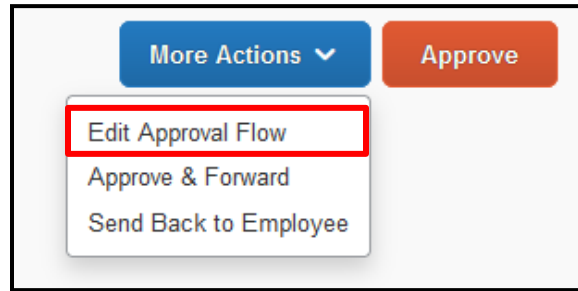
2. In the **Edit Approval Flow** window, **Add a Step** as needed, then search for and select the approver in the **User-Added Approver** field.

A screenshot of a window titled 'Edit Approval Flow' with a close button (X) in the top right corner. The window contains three sections for adding approval steps. The first section is 'Supervisor Approval' with a text input field containing 'Approver, Concur' and a '+ Add Step' link below it. The second section is 'Account Approval' with an empty text input field and a '+ Add Step' link below it. The third section is 'User-Added Approver' with a search input field containing 'Search by Last Name' and a 'Delete' button to its right. Below the search field is a '+ Add Step' link. At the bottom right of the window are 'Cancel' and 'Save' buttons.

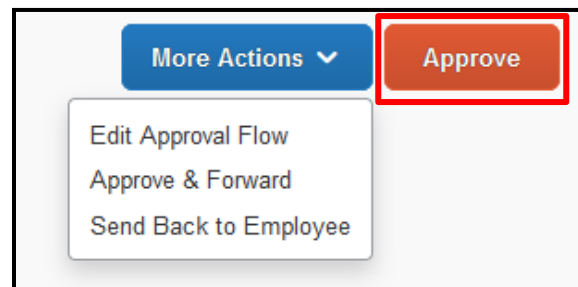
3. When you are done adding your approval steps, click **Save**. to approve and forward the request on to the next step and approver you added to the workflow.

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**.

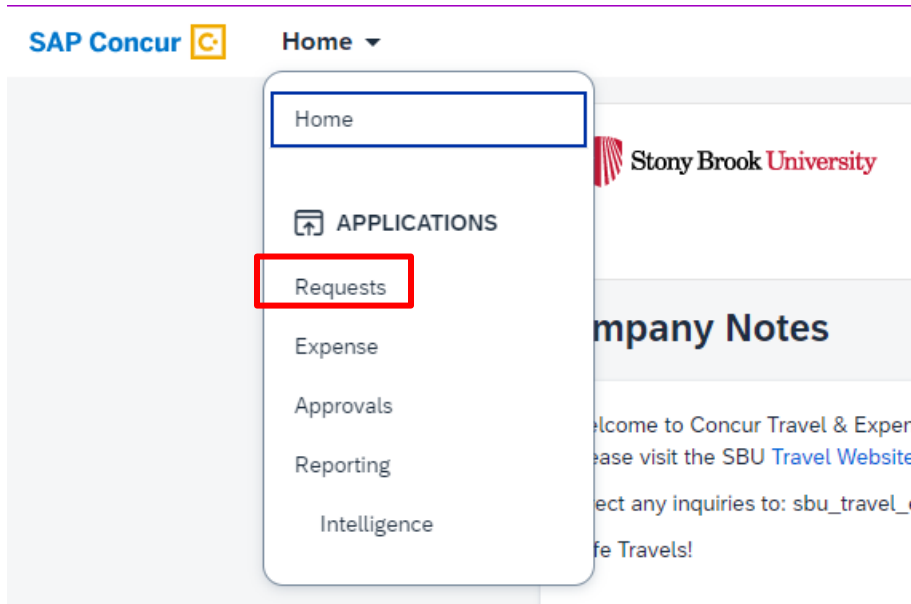


Closing a Request

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**

Home / Requests / Manage Requests

Manage Requests

Request Library View Approved + Create New Request

Request Name	Status	Request Dates	Requested	Approved	Remaining amount
Rome 10.23 ID: 3RCJ	Approved 10/23/2023	10/09/2023	\$3,000.00	\$3,000.00	\$3,000.00

Home / Requests / Manage Requests / Rome 10.23

Rome 10.23 \$3,000.00

Approved | Request ID: 3RCJ **More Actions** + Create Expense Report

Request Details | Print/Share | Attachments

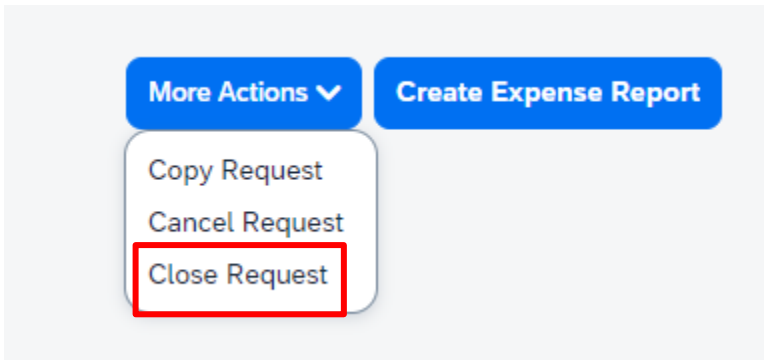
REPORTS: 2

Remaining \$3,000.00

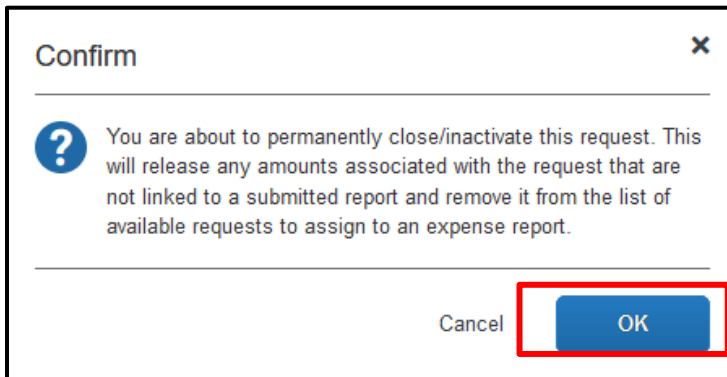
EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Airfare	New York (JFK) - Rome (FCO) : Round Trip	10/09/2023	\$2,000.00	\$2,000.00
Lodging	Rome, ITALY	10/09/2023	\$1,000.00	\$1,000.00
				\$3,000.00

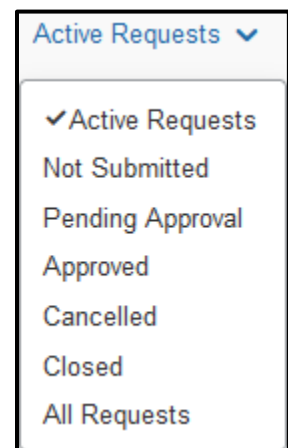
3. Click **More** then select **Close Request**.



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.