SAP Concur Guide

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This guide is meant to be a resource to help faculty & staff submit expense reports/reimbursements.

Important points:

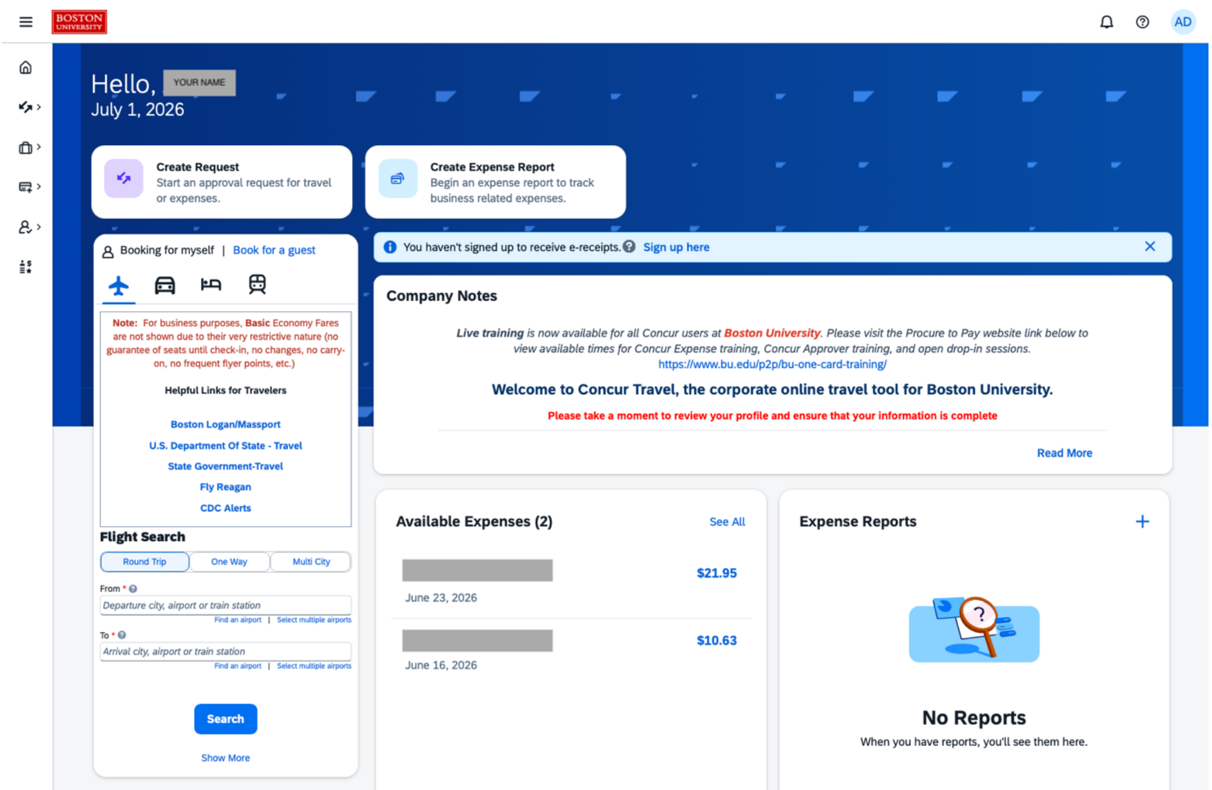
- Enter the correct cost object in the report header.
- If you are charging to a grant, you need to provide a brief justification as to how the expense is related to the grant.
- Every expense needs an *itemized* receipt.
  - Receipts must show proof of payment (i.e. not just an invoice)
  - The receipt must have the date and vendor visible
  - 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 Alex with the guest form.
- Expense reports for a conference can only be submitted after the conference is over
- Membership dues cannot be charged to a federal grant

Sections:

Log into SAP Concur

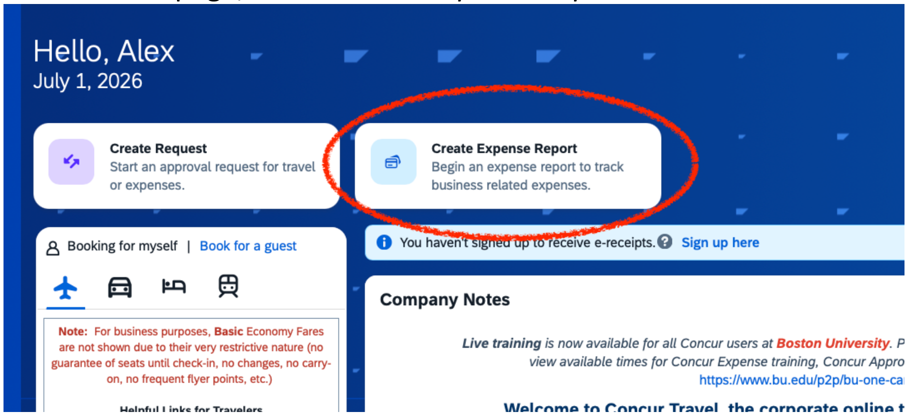
1. Log into BUworks Central Portal: https://ppo.buw.bu.edu/
2. Go to the *Employee Self Service* tab
3. Select *Travel and Expense Reimbursements*
4. Select Manage Business Travel Arrangements and Reimbursements
5. Follow the prompts to login with your Kerberos username and password

SAP Concur Homepage:

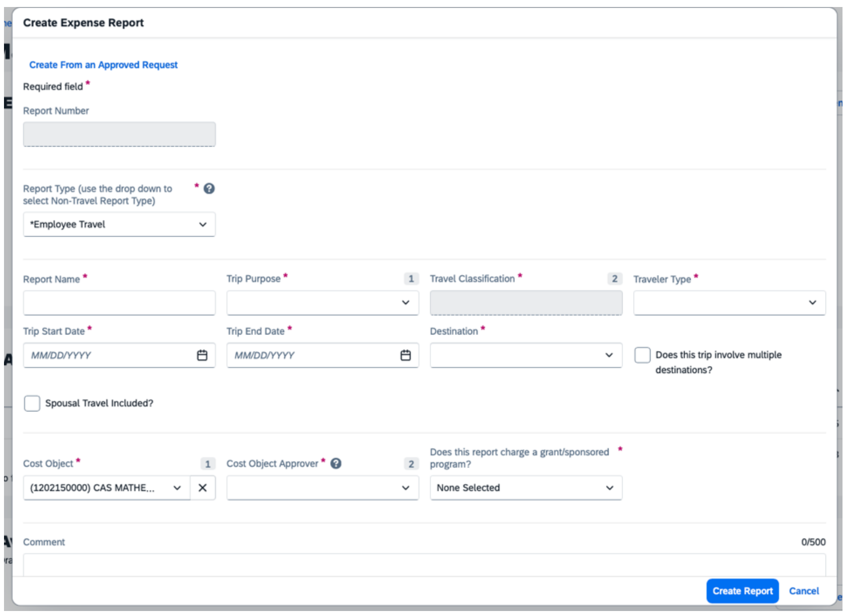


<u>**Creating a New Report**</u>

1. On the homepage, select *Create Expense Report*



2. A window pops up that looks like this:



3. The first thing to do is to designate the report type (Travel or Non-Travel Report)
   a. Use **"Employee Travel"** for travel-related expenses and most purchases that are made off campus
   b. Use **"Employee Non-Travel"** for on-campus purchases and most things not related to travel
      i. *Travel vs Non-Travel can be a little tricky, so please refer to the <u>"Determining Expense Report Type in Concur" Guide</u> from Travel Services if you're unsure (see page 7 of this guide).*
4. Fill in the required fields.
   a. For the report name, I usually do something along the lines of "XYZ Conf May 2026." The system is a bit picky and won't let you add dashes or special characters.

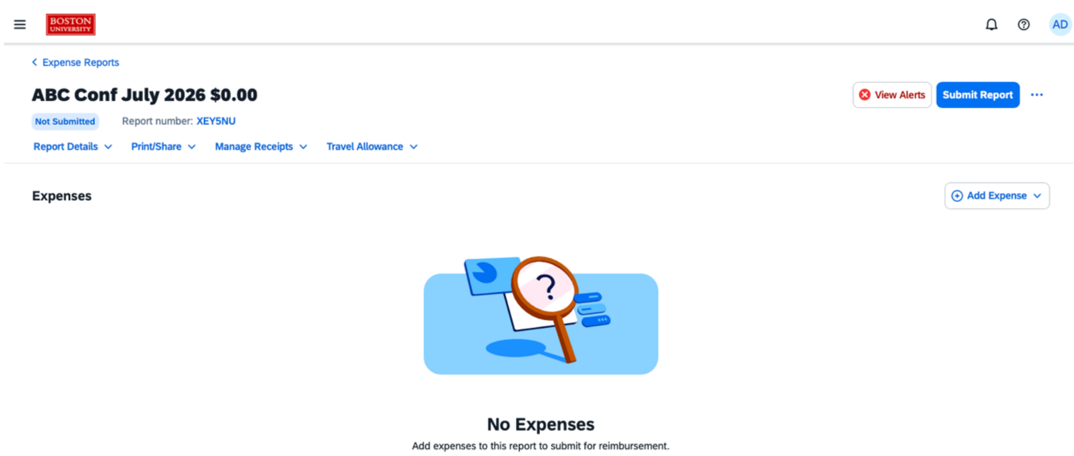
b. Note that the cost object defaults to the account for the department's operating budget. Most of your expenses will not be charged to this account, so you want to make sure you **enter the correct cost object** here (a startup, a grant, etc.). It's important to know the account number/cost object 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. Select Abby as the "cost object approver."

d. 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'.

e. 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 2026. 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.**

5. When you create the report, you will see a page that looks like this:

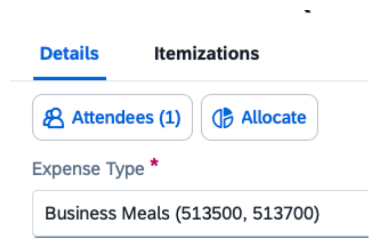


a. To add expenses to the report, select "Add Expense." You will be prompted to select the expense type from a drop-down menu (airfare, accommodations, business meal, etc).

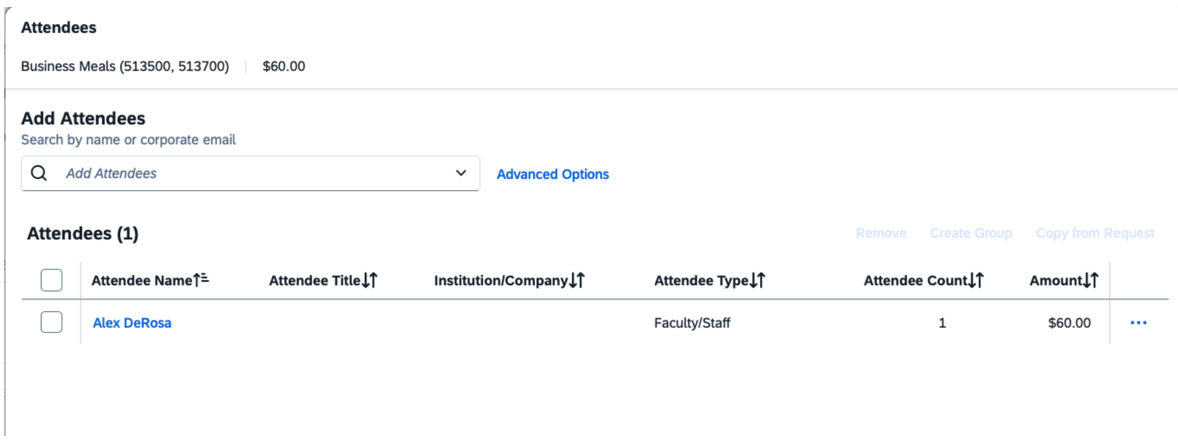
b. Concur will then prompt you to add the information needed for that type of expense. Most of the expense types will require the same information – **itemized** receipt, date of purchase, city of purchase, amount, and currency. You should **always add a comment to describe what the expense was for**. 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

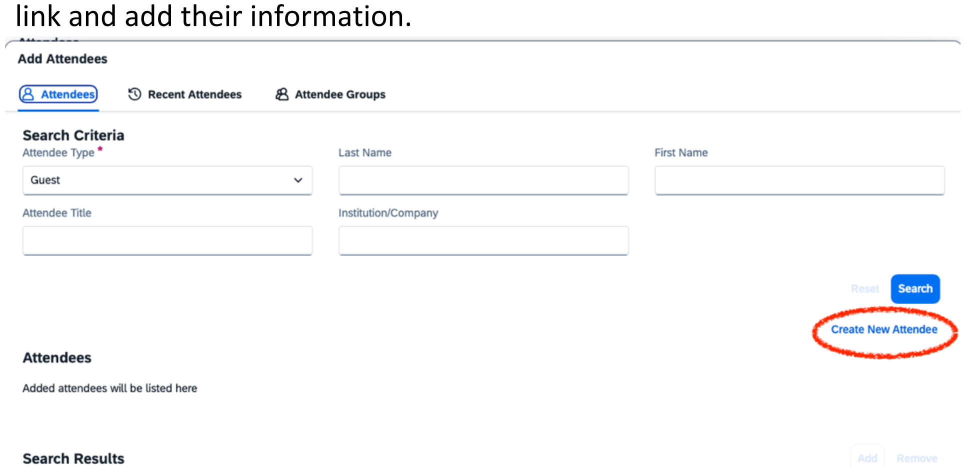
1. When creating a business meal, you are required to include the list of attendees. On the top left corner, select the "Attendees" button.



2. You can search for an attendee in the search box.



   a. If they are not affiliated with BU or if they are not showing up in the search, you will have to click "Advanced Options." Clicking "Advanced Options" will take you to this window:
   b. If you haven't added someone before, you can select the "Create New Attendee" link and add their information.



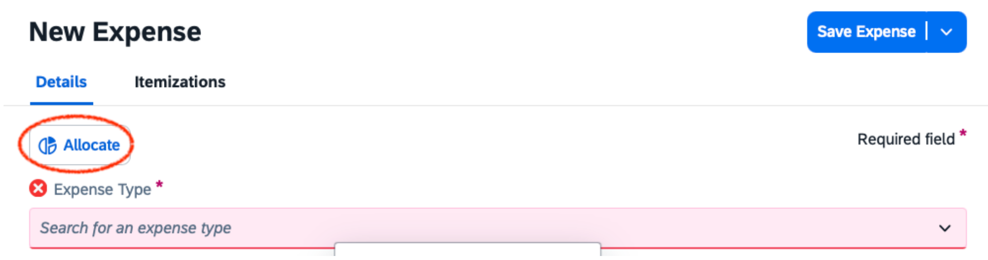
   c. The "Recent Attendees" tab shows a list of recent attendees you've had at other business meals. You can just select them from the list to add them.
   d. The "Attendee Groups" tab allows you to create a shortcut to add attendees in bulk. For instance, if your research group regularly has lunch with the exact same people, you can create a group with those people so you can add them all at once.

Allocating an Expense

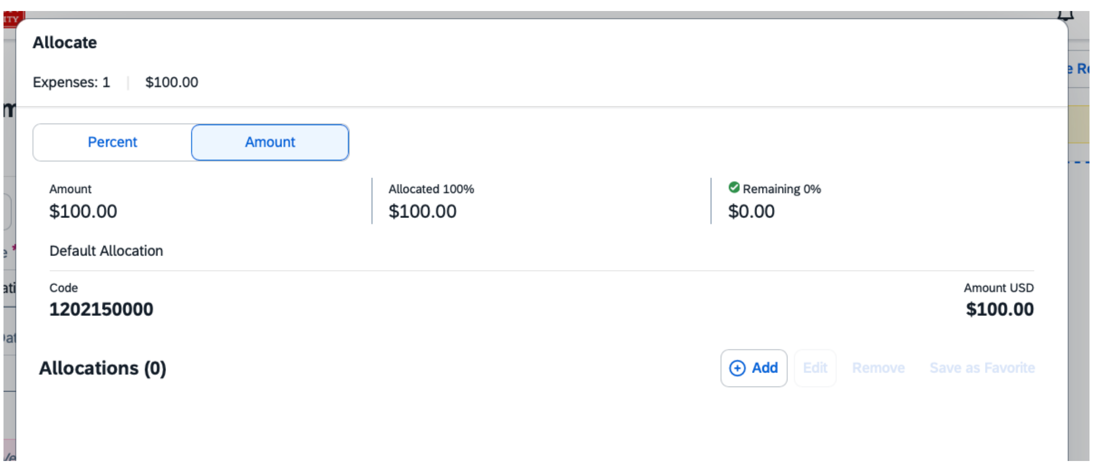
All expenses in a report will be charged to the same cost object by default (the one you indicated in your report header when you first made the report).

The "Allocate" function can be used when you want to split an expense between two cost objects, or when there is a specific charge in your report that needs to be charged to a different cost object from the rest.

1. To allocate an expense, open the expense and hit the "Allocate" button.



2. On the "Allocate" page, you'll see the total amount and the default cost object for the report. To add a new allocation, hit "add." You can choose to allocate either by percent or amount using the tabs at the top.



3. Enter the cost object you're looking to allocate to and select Abby as the approver.

4. The new cost object should now show up in this window under "Allocations." If you're only looking to partially allocate the expense, enter the how much you wish to allocate to this new cost object.

5. After you're done, you can check to see how much you've allocated to each cost object in your report under "Report Details" → "Allocation Summary."

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Determining Expense Report Type in Concur
Travel vs. Non-Travel

★ Applicable report type ⊘ Not applicable report type

Expense Type		Business Travel/Off-Campus Purchases		Campus/Base Location Purchases	
		Report Type		Report Type	
		Travel Report	Non-Travel Report	Travel Report	Non-Travel Report
Office Expenses	Office Supplies; Printing, Photocopying, Stationery; Reproduction & Printing	★			★
	Mail & Postage Service (Bulk); Freight & Shipping	★			★
Supplies *	Coffee/Water Services; Promotional Items; Computer Supplies/Equipment	★			★
	Research Supplies; Animal Research Supplies; Facilities/Maintenance Supplies	⊘			★
Services	Field trips/Excursions	⊘			★
	Marketing & Promotion; Hardware Maintenance; Software Maintenance	⊘			★
Libraries	Library Books (Electronic, Printed); Library Periodicals (Electronic, Electronic One Time, Printed); Other Media (Music, Rare Books)	⊘			★

*The University always encourages the use of **Guided BUying** to make supply purchases

**Catering on the Charles should only be paid for via Internal Service Request (ISR)

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Determining Expense Report Type in Concur
Travel vs. Non-Travel

Applicable report type — Not applicable report type

Expense Type		Business Travel/Off-Campus Purchases: Travel Report	Business Travel/Off-Campus Purchases: Non-Travel Report	Campus/Base Location Purchases: Travel Report	Campus/Base Location Purchases: Non-Travel Report
Misc.	Article Publication Fee; Books/Periodicals; Professional Subscriptions/Dues	★			★
Telecom	Telecom Usage; Telecom Equipment	⊘			★
Facilities/ Facilities Service	Equipment Rental (Lease); Routine Permits Inspections (Fees);	⊘			★
	Major Consutrction Permits (Fees); Permits; Unclassified Expense (Facilities Only)	⊘			★
	Facilities Maintenance; Rubbish	⊘			★
Travel Expenses	Accomodations; Daily Allowances; Hotel Internet Fees; Hotel Phone/Fax, Hotel Tax, Travel Incidentals; Travel Laundry, Misc. Travel	★		★	
Transportation	Airfare, Airline Fees	★		⊘	
	Car Rental, Mileage, Fuel, Parking/Meters, Public Transportation, Taxi, Tolls/Road Charges, Train Fare	★			★

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Expense Type		Business Travel/Off-Campus Purchases — Report Type		Campus/Base Location Purchases — Report Type	
		Travel Report	Non-Travel Report	Travel Report	Non-Travel Report
Meals	Meals for business/staff meetings, Individual meals	★			★
	Alcohol & Food for Departmental Event	★			★
	Catering Services **		★		★
	Food, Liquor & Entertainment Licenses		★		★
	Non-Alcoholic Beverages		★		★
Fees	Conference Registrations	★			★
	Credit Card Fee	★			★
	Currency Exchange Fees; Passport/Visa Fees	★		★	
	Dues & Memberships; Licenses		★		★
	Parking Licenses & Fees	★			★
Misc.	Advertising/Public Relations	⊘			★

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Determining Expense Report Type in Concur
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Expense Type		Business Travel/Off-Campus Purchases		Campus/Base Location Purchases	
		Report Type		Report Type	
		Travel Report	Non-Travel Report	Travel Report	Non-Travel Report
Misc.	Fraudulent/Disputed Transactions & Refunds	★			★
Misc.	Materials; Laundry & Uniforms	★			★
Misc.	Non-Reimbursable Personal Expense	★	★	★	★
Misc.	Tips/Gratuities	★			★
Misc.	Human Subject Recruitment Advertising; Study Subject Payments	⦸			★
Misc.	Moveable Capital Equipment; Non-Capital/Minor Equipment	⦸			★
Misc.	Software License	⦸			★
Misc.	Flowers	★			★
Misc.	Gifts	★			★
Misc.	Sponsored Research Allowed Child Care	⦸			★

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