

# SAP Concur Guide

Created by Jiana Capone, 2023; Revised by Alex DeRosa, June 2026

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

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## 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:

**BOSTON UNIVERSITY**

Hello, **YOUR NAME**  
July 1, 2026

**Create Request**  
Start an approval request for travel or expenses.

**Create Expense Report**  
Begin an expense report to track business related expenses.

Booking for myself | Book for a guest

Note: For business purposes, Basic Economy Fares are not shown due to their very restrictive nature (no guarantee of seats until check-in, no changes, no carry-on, no frequent flyer points, etc.)

**Helpful Links for Travelers**

- Boston Logan/Massport
- U.S. Department Of State - Travel
- State Government-Travel
- Fly Reagan
- CDC Alerts

**Flight Search**

Round Trip | One Way | Multi City

From \*  
Departure city, airport or train station  
Find an airport | Select multiple airports

To \*  
Arrival city, airport or train station  
Find an airport | Select multiple airports

**Search**

Show More

You haven't signed up to receive e-receipts. [Sign up here](#)

**Company Notes**

Live training is now available for all Concur users at **Boston University**. Please visit the Procure to Pay website link below to view available times for Concur Expense training, Concur Approver training, and open drop-in sessions.  
<https://www.bu.edu/p2p/bu-one-card-training/>

**Welcome to Concur Travel, the corporate online travel tool for Boston University.**

Please take a moment to review your profile and ensure that your information is complete

[Read More](#)

**Available Expenses (2)** [See All](#)

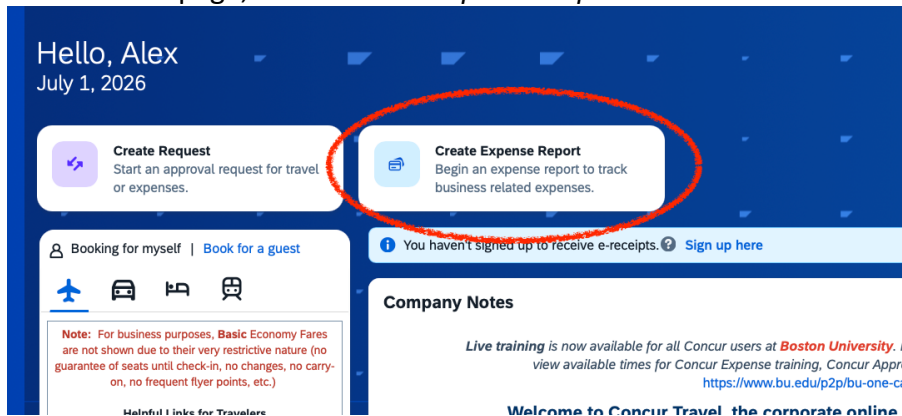
|               |         |
|---------------|---------|
| June 23, 2026 | \$21.95 |
| June 16, 2026 | \$10.63 |

**Expense Reports** [+](#)

**No Reports**  
When you have reports, you'll see them here.

## Creating a New Report

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



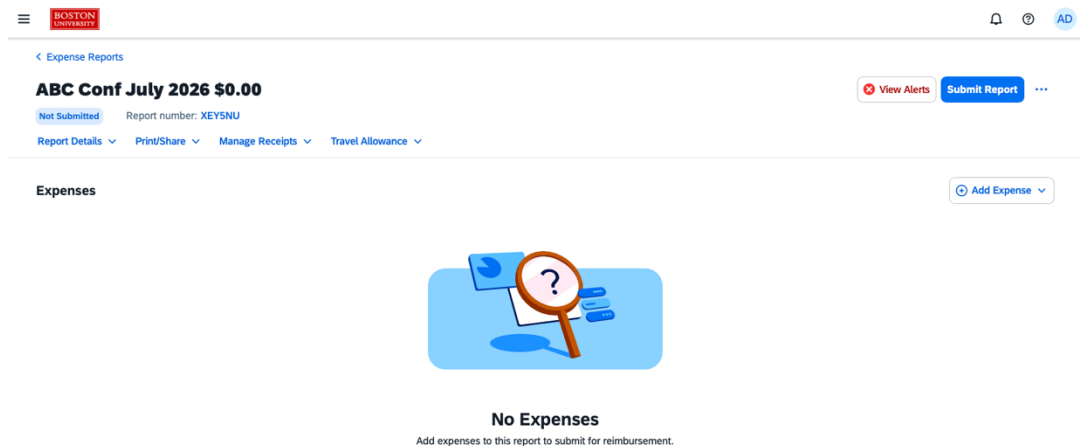
2. A window pops up that looks like this:

The screenshot shows the 'Create Expense Report' form. It includes fields for 'Report Number', 'Report Type' (with a dropdown menu set to 'Employee Travel'), 'Report Name', 'Trip Purpose', 'Travel Classification', 'Traveler Type', 'Trip Start Date', 'Trip End Date', 'Destination', 'Spousal Travel Included?', 'Cost Object', 'Cost Object Approver', and 'Does this report charge a grant/sponsored program?'. There is also a 'Comment' field at the bottom. The form has a 'Create Report' button and a 'Cancel' button.

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 [“Determining Expense Report Type in Concur” Guide](#) 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.

**Details**   **Itemizations**

[Attendees \(1\)](#)   [Allocate](#)

Expense Type \*

Business Meals (513500, 513700)

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

**Attendees**

Business Meals (513500, 513700)   \$60.00

**Add Attendees**

Search by name or corporate email

  [Advanced Options](#)

**Attendees (1)**   [Remove](#)   [Create Group](#)   [Copy from Request](#)

| <input type="checkbox"/> | Attendee Name↑↓ | Attendee Title↑↓ | Institution/Company↑↓ | Attendee Type↑↓ | Attendee Count↑↓ | Amount↑↓ |     |
|--------------------------|-----------------|------------------|-----------------------|-----------------|------------------|----------|-----|
| <input type="checkbox"/> | Alex DeRosa     |                  |                       | Faculty/Staff   | 1                | \$60.00  | ... |

- 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.

**Add Attendees**

[Attendees](#)   [Recent Attendees](#)   [Attendee Groups](#)

**Search Criteria**

Attendee Type \*   Last Name   First Name

Guest     

Attendee Title   Institution/Company

[Reset](#)   [Search](#)

[Create New Attendee](#)

**Attendees**

Added attendees will be listed here

**Search Results**   [Add](#)   [Remove](#)

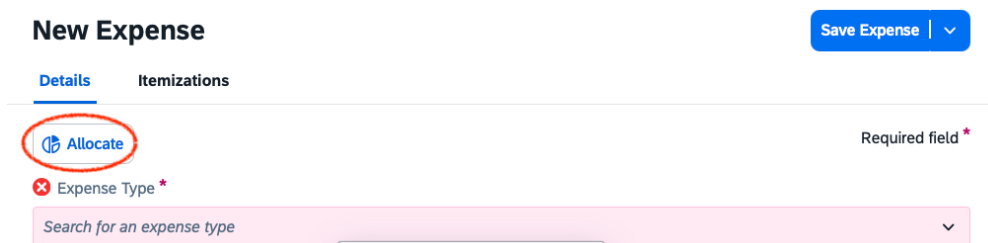
- c. The “Recent Attendees” tab shows a list of recent attendees you’ve had at other business meals. You can just select them from the list to add them.
- d. The “Attendee Groups” tab allows you to create a shortcut to add attendees in bulk. For instance, if your research group regularly has lunch with 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).

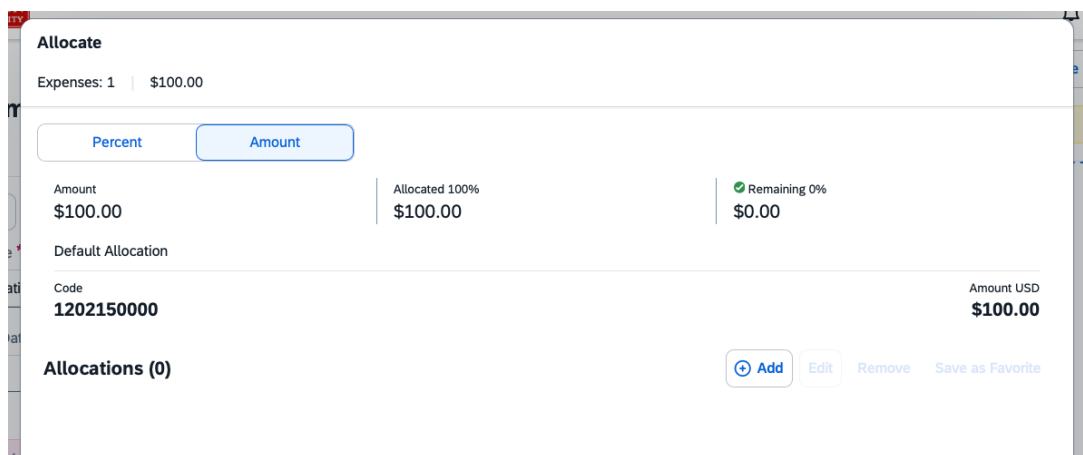
The “Allocate” function can be used when you want to split an expense between two cost objects, or when there is a specific charge in your report that needs to be charged to a different cost object from the rest.

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



The screenshot shows the 'New Expense' form. At the top right is a blue 'Save Expense' button. Below the title are two tabs: 'Details' (active) and 'Itemizations'. In the 'Details' tab, there is a blue 'Allocate' button with a circular icon, which is circled in red. Below this is a red 'Expense Type' field with a search bar and a dropdown arrow. A 'Required field' asterisk is visible to the right.

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.



The screenshot shows the 'Allocate' page. At the top, it says 'Expenses: 1 | \$100.00'. Below this are two tabs: 'Percent' and 'Amount' (active). The 'Amount' tab shows a table with columns for 'Amount', 'Allocated', and 'Remaining'. The 'Amount' column shows '\$100.00', the 'Allocated' column shows '\$100.00', and the 'Remaining' column shows '\$0.00'. Below this is a 'Default Allocation' section with a 'Code' field showing '1202150000' and an 'Amount USD' field showing '\$100.00'. At the bottom, there is an 'Allocations (0)' section with a '+ Add' button and 'Edit', 'Remove', and 'Save as Favorite' links.

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.”

# 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)

**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 |
| <b>Misc.</b>                              | Article Publication Fee;<br>Books/Periodicals;<br>Professional Subscriptions/Dues                                                               | ★                                    |                   |                                | ★                 |
| <b>Telecom</b>                            | Telecom Usage; Telecom Equipment                                                                                                                |                                      | ⊘                 |                                | ★                 |
| <b>Facilities/<br/>Facilities Service</b> | Equipment Rental (Lease);<br>Routine Permits Inspections (Fees);                                                                                |                                      | ⊘                 |                                | ★                 |
|                                           | Major Construction Permits (Fees);<br>Permits; Unclassified Expense (Facilities Only)                                                           |                                      | ⊘                 |                                | ★                 |
|                                           | Facilities Maintenance; Rubbish                                                                                                                 |                                      | ⊘                 |                                | ★                 |
| <b>Travel Expenses</b>                    | Accommodations;<br>Daily Allowances;<br>Hotel Internet Fees;<br>Hotel Phone/Fax, Hotel Tax, Travel Incidentals;<br>Travel Laundry, Misc. Travel | ★                                    |                   | ★                              |                   |
| <b>Transportation</b>                     | Airfare, Airline Fees                                                                                                                           | ★                                    |                   | ⊘                              |                   |
|                                           | Car Rental, Mileage, Fuel, Parking/Meters, Public Transportation, Taxi, Tolls/Road Charges, Train Fare                                          | ★                                    |                   |                                | ★                 |

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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 |
| 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 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 |
| 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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