

# SAP Concur QRG

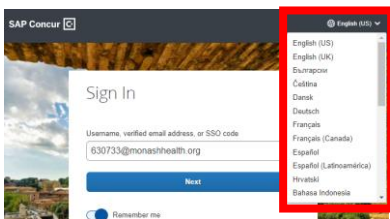
## Making an expenditure reimbursement claim in SAP Concur

This quick reference guide is designed to show you how to:

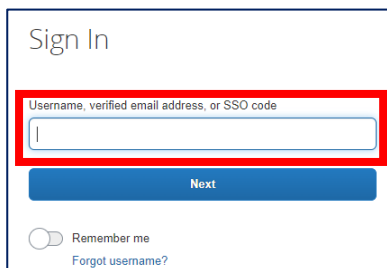
- Log into SAP Concur via desktop
- Log into SAP Concur via mobile device
- Place an expenditure reimbursement claim via desktop device
- Place an expenditure reimbursement claim via mobile device
- Entering required details for CME Travel Allowance claims
- Entering foreign currencies into an expense form

### Logging into SAP Concur via Desktop

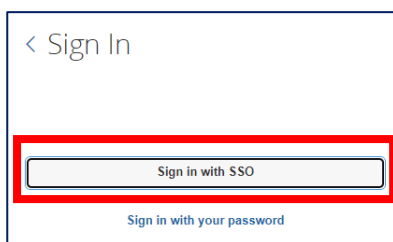
1. Open <https://www.concursolutions.com/> on desktop, or
2. **Select 'English (UK)' as the system language preference.** This is essential for ensuring the terminology presented within SAP Concur aligns with the terminology used at Monash Health.



3. Enter your Monash Health account <your-employee-number>@monashhealth.org into the 'Sign In' field, and then select 'Next'



4. Select 'Sign In With SSO'



5. Enter your Monash Health account <your-employee-number>@monashhealth.org into the 'Sign In' field, and then select 'Next'

Monash Health

Sign in

employeeeID@monashhealth.org

[Can't access your account?](#)

Back Next

6. Enter your Monash Health password into the field, and select 'Sign In'

Monash Health

Enter password

.....

[Forgot my password](#)

Sign in

## Logging into SAP Concur via mobile device

7. Open the SAP Concur app on your mobile device
8. Enter your Monash Health account <your-employee-number>@monashhealth.org into the 'Sign In' field, and then select 'Next'

SAP Concur

Sign In

Username, verified email address or SSO code

630733@monashhealth.org

Next

Remember me

[Forgot username?](#)

9. Select 'Sign in with SSO'

SAP Concur

Sign In

630733@monashhealth.org

Sign in with SSO

You will be taken to the SAP Concur app homepage.

## Placing an expenditure reimbursement claim via desktop

1. Log into SAP Concur, and select 'Start a Claim'



Note: If the terminology appearing is different (E.g. an option for 'Start a Report' appears), you need to log out of SAP Concur, and **ensure you have selected 'English (UK)'** as the system language preference before proceeding with the Sign-In process.

2. Ensure you:
  - enter an appropriate name for the claim report
  - select the date for which the claim is being entered

All other fields will automatically populate based on your primary cost centre, including the 'Policy' field. E.g. Senior Medical Staff should have 'CME Expense Policy' selected in the policy field.

Note: if the expense reimbursement claim is related to a different cost centre other than your primary cost centre, proceed with the claim, and contact your Business Manager to transfer the cost. Ensure you provide the details of the claim, and the details of the required receiving cost centre

 A screenshot of the 'Create New Claim' form in SAP Concur. The form is titled 'Create New Claim' and has a close button (X) in the top right corner. A red asterisk indicates a required field. The form contains several input fields:
 

- Policy:** \*TNE Expense Policy
- Report Name \*:** Education Expense Claim
- Report Date:** 04/05/2022 (with a calendar icon)
- Entity:** SHS01
- Level0:** (00COS) CORPORATE
- Level1:** (01ITS) DIGITAL HEALTH DIVISION
- Level2:** (02COM) DIGITAL HEALTH DIVISION
- Level3:** (03ITS) DIGITAL HEALTH DIVISION
- Level4:** (04NON) NON CAMPUS SPECIFIC
- Cost Centre:** (Y1117) Advancing Care
- Comment:** A large text area for entering a comment.

 At the bottom of the form, there are 'Cancel' and 'Create Claim' buttons. The 'Policy' and 'Report Name' fields are highlighted with a red box.

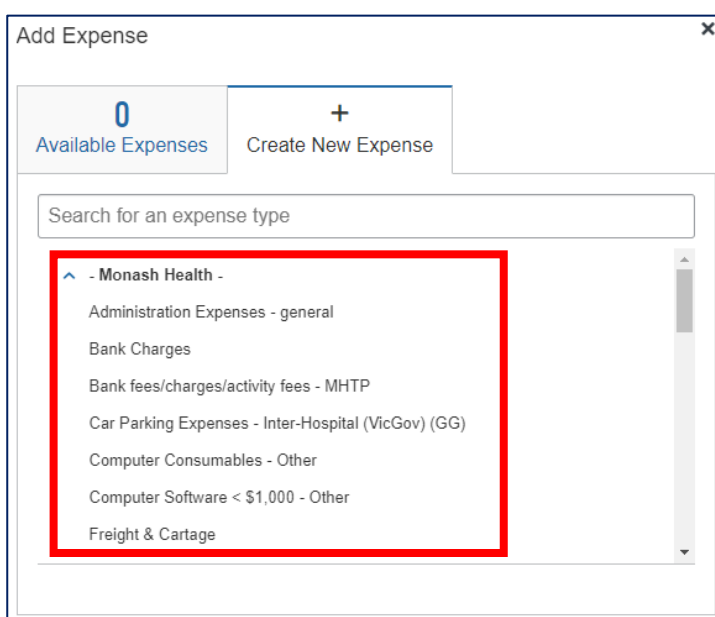
## 3. Select 'Create Claim'



## 4. Select 'Add Expense'



## 5. Choose the appropriate Monash Health category that closest matches the purpose of your claims. Note: this is not connected or related to any 'account code'. It is to categorise your expense type.



## 6. Under the 'New Expense' details, enter the following mandatory details:

- Expense Type (auto populated from the claim category you selected)
- Transaction Date
- City of purchase
- Payment Type
- Amount
- Currency
- Receipt Status

The 'Business Purpose', 'Vendor Name' and 'Comment' fields should be filled if applicable.

*New Expense*

Details    Itemisations

Allocate \* Required field

Expense Type \*  
Staff Training & Development - Other

Transaction Date \*  
DD/MM/YYYY

Business Purpose

Enter Vendor Name

City of Purchase \*

Amount \*

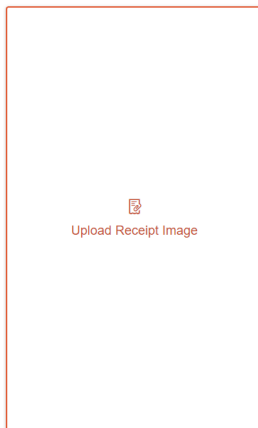
Currency \*  
Australia, Dollar

Receipt Status \*  
No Receipt

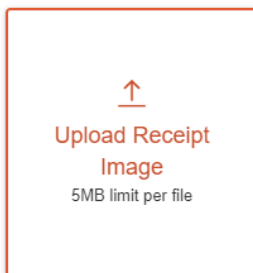
Personal Expense (do not reimburse)

Comment

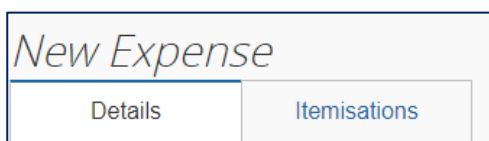
7. Select 'Upload the expense receipt'



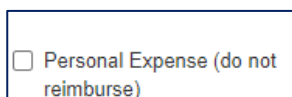
8. Select 'Upload Receipt Image' and choose the appropriate receipt file



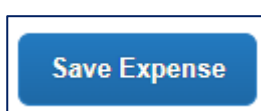
9. If Itemisation is required, select the 'Itemisations' tab



10. The expense can be itemised here. Indicate portions of the expense that are personal expenses not for reimbursement by selecting the 'Personal Expense (do not reimburse)' checkbox



11. Select 'Save Expense'



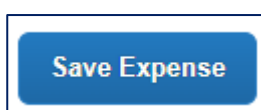
12. If you need to add multiple attachments, select the checkbox on the existing expense listed, and then select 'edit'



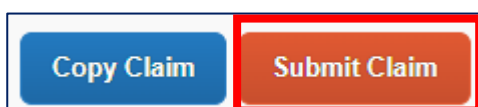
13. Under the already attached receipt, select 'Append' to add an additional attachment. Repeat this step if additional attachments are required.



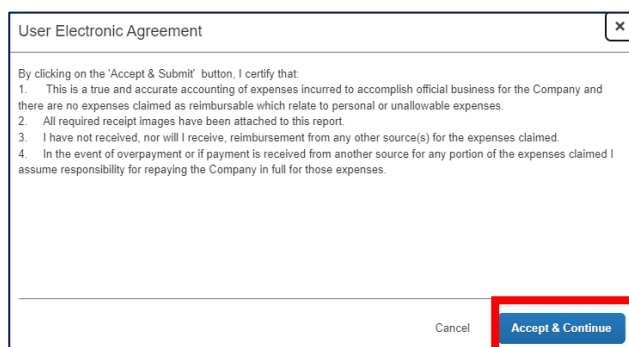
14. Select 'Save Expense'



15. Select 'Submit Claim' to confirm and submit the claim.



## 16. Read the agreement, and then select 'Accept & Continue'



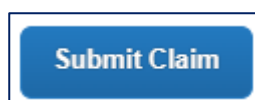
User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

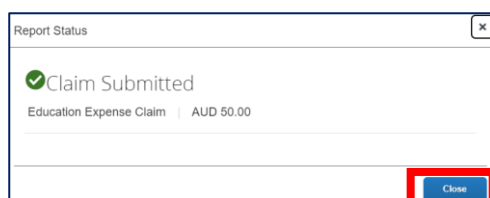
1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Cancel **Accept & Continue**

## 17. Review and ensure all details are correct, and then select 'Submit Claim' to complete



## 18. A confirmation will appear to indicate the claim has been submitted successfully and has been sent to the appropriate approver for your respective cost centre. Select 'close' to return to your profile dashboard



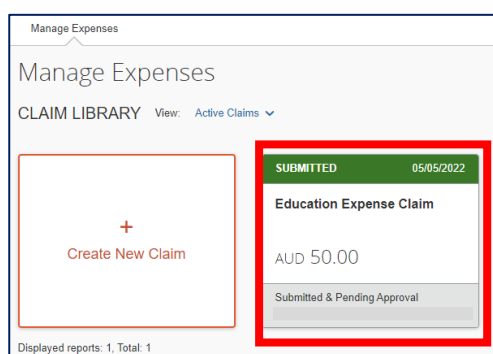
Report Status

✔ Claim Submitted

Education Expense Claim | AUD 50.00

Close

## 19. Under your existing expenses, you can continue to monitor and track the progress of your claim



Manage Expenses

CLAIM LIBRARY View: Active Claims

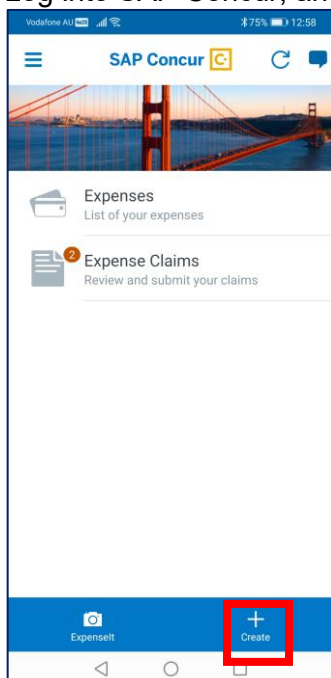
Create New Claim

Displayed reports: 1, Total: 1

STATUS	DATE
SUBMITTED	05/05/2022
Education Expense Claim	
AUD 50.00	
Submitted & Pending Approval	

## Placing an expenditure reimbursement claim via mobile device application

1. Log into SAP Concur, and select 'Create'



2. Fill in the required fields for making an expense claim including:

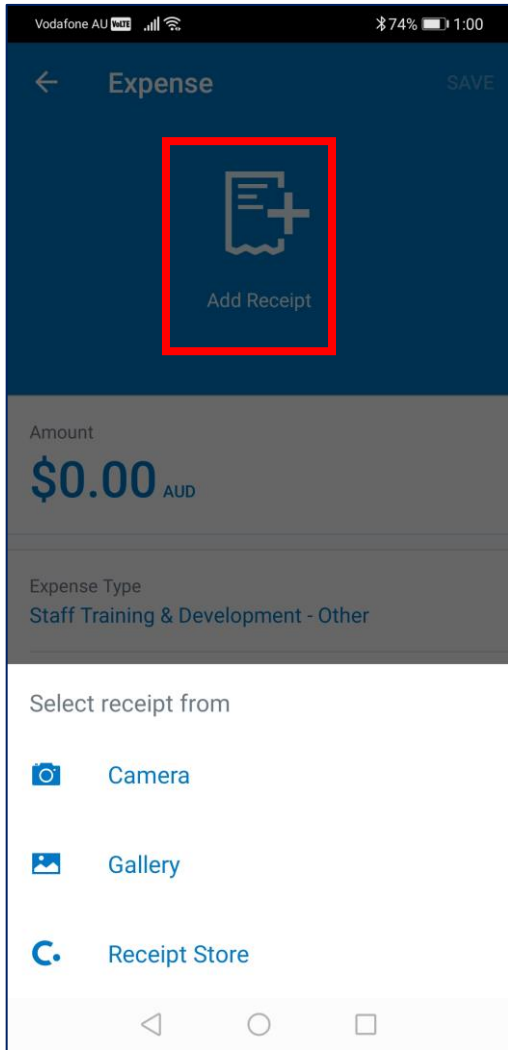
- Amount
- Expense Type
- Transaction Date
- Receipt Status

Other fields including Location and comments should be completed if applicable

Amount	\$505.00 AUD
Expense Type*	Staff Training & Development - Other
Transaction Date*	Thu, May 05

3. Select 'Add Receipt'. You will then have the option to upload an existing photo of your receipt stored on your device gallery, or take a photo of your receipt via the device's in-built camera if available





4. Select 'Save' to confirm the details entered for the expense type

Expense

SAVE

Amount  
**\$505.00** AUD

Expense Type  
Staff Training & Development - Other VicGov (No...

Date  
May 05, 2022

OPTIONAL

Location  
Melbourne, Victoria

Supplier

Comment

5. From the confirmed expense list, select the outstanding expense for claiming

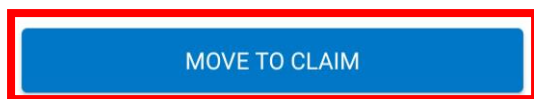
Expenses

Staff Training & Developme... **\$505.00**

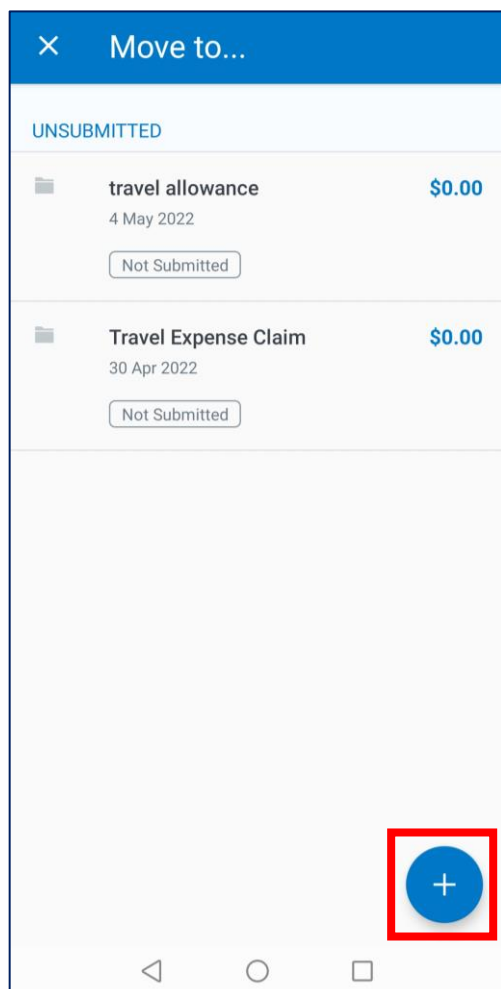
May 5

Melbourne, Victoria

6. Confirm all details of the expense are correct, and select 'Move to Claim'



7. Select the add button to create a new claim



8. Ensure you:
- enter an appropriate name for the claim report
  - select the date for which the claim is being entered
  - additional comments to describe the claim, if applicable

All other fields will automatically populate based on your primary cost centre, including the 'Policy' field. E.g. Senior Medical Staff should have 'CME Expense Policy' selected in the policy field.

Note: if the expense reimbursement claim is related to a different cost centre other than your primary cost centre, proceed with the claim, and contact your Business Manager to transfer the cost. Ensure you provide the details of the claim, and the details of the required receiving cost centre

Vodafone AU 74% 1:02

× New Claim CREATE

Policy\*  
\*TNE Expense Policy

Report Name\*  
Mobile Expense Claim 2022-05-05 31/32

Report Date  
Thu, May 05

Comment

Entity  
SHS01

Level0  
CORPORATE

Level1  
DIGITAL HEALTH DIVISION

Level2  
DIGITAL HEALTH DIVISION

Level3  
DIGITAL HEALTH DIVISION

9. Confirm you have entered the correct details, and then select 'Create'

Vodafone AU 74% 1:02

× New Claim CREATE

Policy\*  
\*TNE Expense Policy

Report Name\*  
Mobile Expense Claim 2022-05-05 31/32

Report Date  
Thu, May 05

Comment

Entity  
SHS01

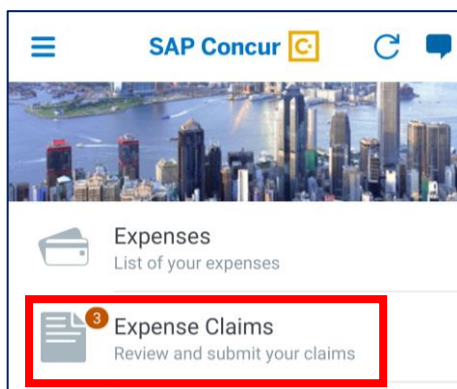
Level0  
CORPORATE

Level1  
DIGITAL HEALTH DIVISION

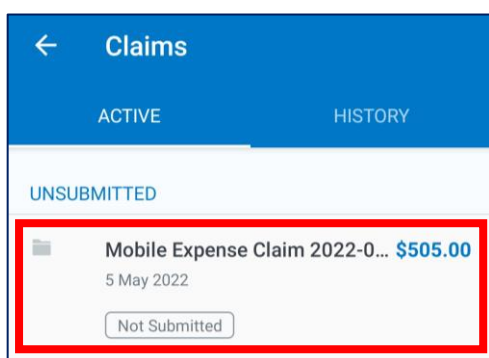
Level2  
DIGITAL HEALTH DIVISION

Level3  
DIGITAL HEALTH DIVISION

10. Return to your SAP Concur dashboard and select 'Expense Claims'. Here you will be able to review previously submitted claims and track their status, and review pending claims unsubmitted



11. Select the outstanding unsubmitted claim



12. Review all the information entered in the details, expense, and receipts tabs, and then select 'Submit'



### 13. Review the User Electronic Agreement, and then select 'Submit'

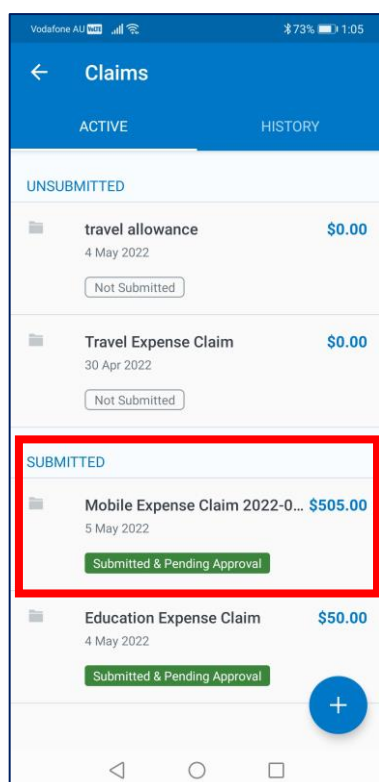
**User Electronic Agreement**

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

CANCEL SUBMIT

### 14. You will now be navigated back to the Claims menu. Confirmation of your submitted claim can be viewed from here, and tracked for updates and progress on approval status



## Entering Required Details For CME Travel Claims

Note: **the following steps are only applicable for CME (Senior Medical Staff) Travel Claims**. All other employees must complete the **Travel Application Form** available on the Monash Health intranet, as per the Monash Health Travel Operation Policy.

- When entering the details of a Travel Allowance Claim, CME employees will be expected to enter the details of the travel itinerary including:
  - Start location, Date and Time
  - Arrival location
  - End location, Date and Time
  - Any other travel destinations requiring claim added via the 'Add destination' option

The screenshot shows the 'Travel Allowance' form with the 'Itinerary' section highlighted. The form includes the following fields:

- Start Location \***: Sydney, AUSTRALIA
- Start Date \***: 15/03/2022
- Start Time \***: 09:30 AM
- Arrival Location \***: Melbourne, AUSTRALIA
- End Location \***: Sydney, AUSTRALIA
- End Date \***: 16/03/2022
- End Time \***: 09:30 AM

Buttons for '+ Add Destination' are visible between the location fields. At the bottom right, there are 'Cancel' and 'Next' buttons, with a note: 'Next: Adjust your travel allowance'.


- Travel allowance claims will also provide the option to include/exclude details from the claim. **To exclude a meal, you must select the checkbox** associated with the respect day and meal time. Ensure you add the appropriate receipts for meal claims as part of your expenses details.

The screenshot shows the 'Adjustments' section of the 'Travel Allowance' form. It includes a table with the following data:

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Reimbursement Amount
All Days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tue, 15/03/2022 Melbourne, AUSTRALIA	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUD 102.30
Wed, 16/03/2022 Melbourne, AUSTRALIA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AUD 66.00
<b>Total:</b>					<b>AUD 168.30</b>

Below the table, there is a 'View: Adjustments' dropdown menu and a note: 'Adjustments allow you to reduce your specific travel allowances if meals were provided. For personal leave, you can exclude the day. Refer to your company's policy guidelines.'

- On the expenses Dashboard, you can review and edit Travel Allowance claims, including the meal allowances by selecting the appropriate claim component, and then selecting 'Edit'. Note: all claims include incidental payments of \$29.20 per day in the calculations

Travel Allowance AUD 168.30 

Not Submitted [Copy Claim](#) [Submit Claim](#)

Claim Details ▼ | Print ▼ | Manage Receipts ▼ | Travel Allowance ▼

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to ▼](#)

<input checked="" type="checkbox"/>	Receipt <span>↑↓</span>	Payment Type <span>↑↓</span>	Expense Type <span>↑↓</span>	Supplier Details <span>↑↓</span>	Date <span>≡</span>	Requested <span>↑↓</span>
<input checked="" type="checkbox"/>		Cash	Daily Allowance	Melbourne, Victoria	16/03/2022	AUD 36.80
<input checked="" type="checkbox"/>		Cash	Daily Allowance (Incidentals)	Melbourne, Victoria	16/03/2022	AUD 29.20
<input checked="" type="checkbox"/>		Cash	Daily Allowance	Melbourne, Victoria	15/03/2022	AUD 73.10
<input checked="" type="checkbox"/>		Cash	Daily Allowance (Incidentals)	Melbourne, Victoria	15/03/2022	AUD 29.20
						<b>AUD 168.30</b>



## Entering Foreign Currencies Into An Expense Form

- If an expense has been paid with a foreign currency (currency other than Australian dollars), ensure the foreign currency used is selected from the 'Currency' field of an expense form. The current conversion rate will automatically calculate

*New Expense*

Details    Itemisations

Allocate \* Required field

Expense Type \*

Transaction Date \*       Business Purpose

Enter Vendor Name       City of Purchase \*

Amount \*       Currency \*

- Then, enter the AUD amount paid, based on the amount indicated on your credit card statement or bank statement. This will update the conversion rate. **Ensure you attach a copy of your bank/credit card statement to the expenses 'receipt'/attachment section.**

Amount \*       Currency \*

Conversion Rate \*  Reverse  
AUD

Amount in AUD \*