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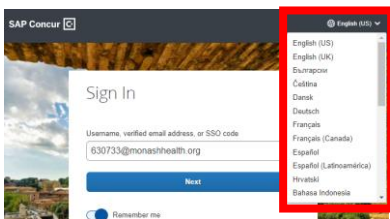
3. Enter your Monash Health account <your-employee-number>@monashhealth.org into the 'Sign In' field, and then select 'Next'
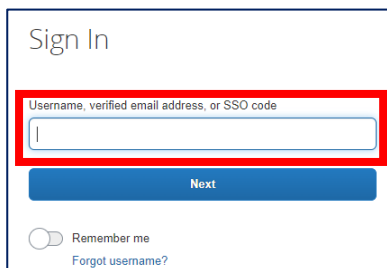
4. Select 'Sign In With SSO'
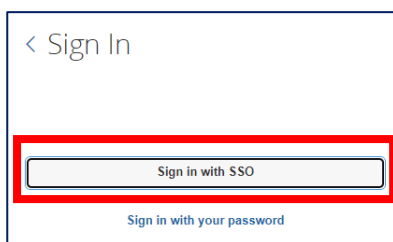
5. Enter your Monash Health account <your-employee-number>@monashhealth.org into the 'Sign In' field, and then select 'Next'

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

9. Select '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:
   o   enter an appropriate name for the claim report
   o   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
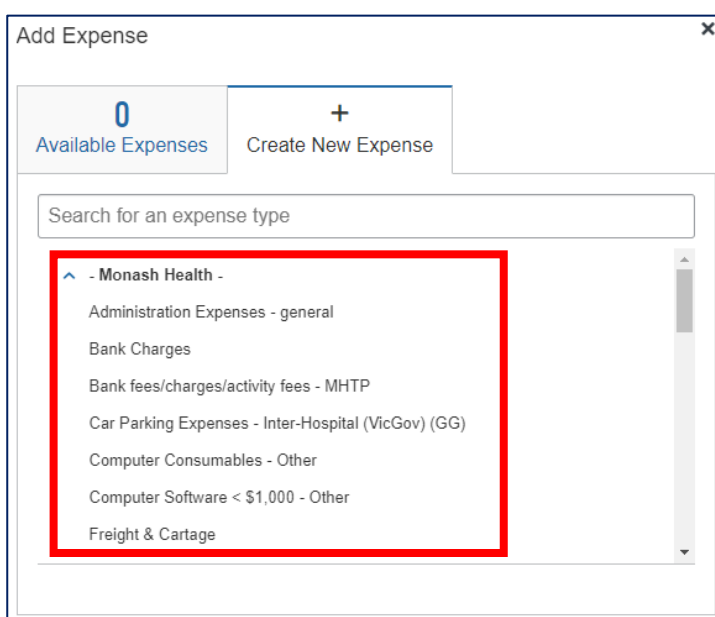

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3. Select 'Create Claim'

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

The 'Business Purpose', 'Vendor Name' and 'Comment' fields should be filled if applicable.
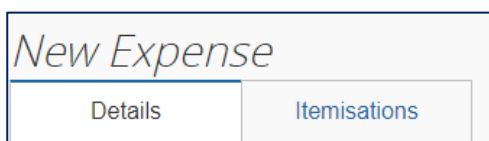
7. Select 'Upload the expense receipt'
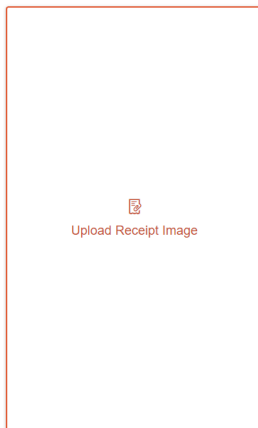
8. Select 'Upload Receipt Image' and choose the appropriate receipt file
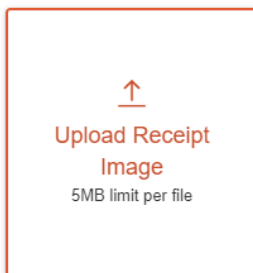
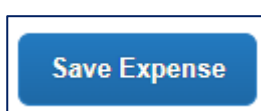9. If Itemisation is required, select the 'Itemisations' tab

New Expense

| Details | Itemisations |

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

☐ Personal Expense (do not reimburse)
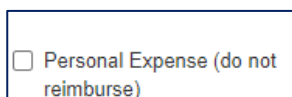
11. Select 'Save Expense'

Save Expense

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

Claim Details ⌄ Print ⌄ Manage Receipts ⌄

Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Move to ⌄

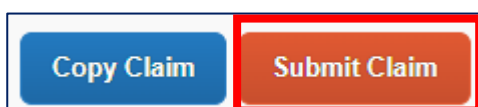| ☑	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Supplier Details ↑↓	Date ≡	Requested ↑↓
☑	🖼	Cash	Staff Training & Development - Other	Melbourne, Victoria	03/05/2022	AUD 50.00

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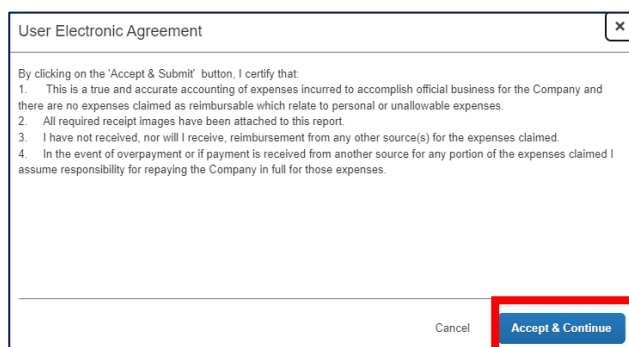
Detach	Append

14. Select 'Save Expense'

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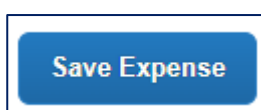
15. Select 'Submit Claim' to confirm and submit the claim.

Copy Claim	Submit Claim

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

17. Review and ensure all details are correct, and then select 'Submit Claim' to complete
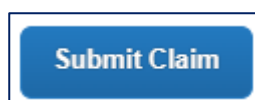
18. A confirmation will appear to indicate the claim has been submitted successfully and has been sent to the appropriate approver for your respective cost centre. Select 'close' to return to your profile dashboard
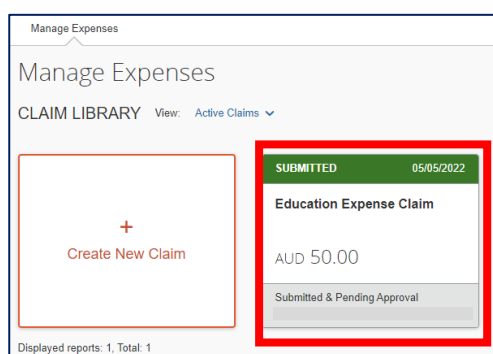

19. Under your existing expenses, you can continue to monitor and track the progress of your claim

Placing an expenditure reimbursement claim via mobile device application

1. Log into SAP Concur, and select 'Create'
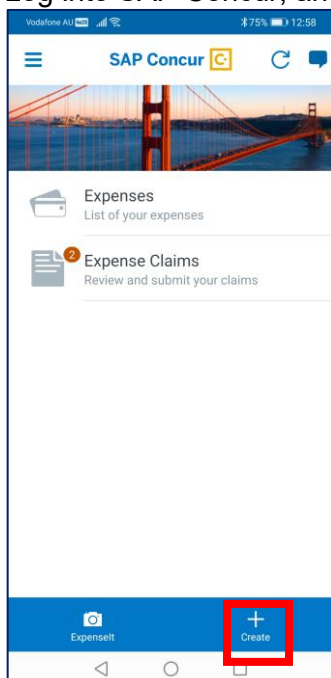
2. Fill in the required fields for making an expense claim including:
   o   Amount
   o   Expense Type
   o   Transaction Date
   o   Receipt Status

   Other fields including Location and comments should be completed if applicable

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

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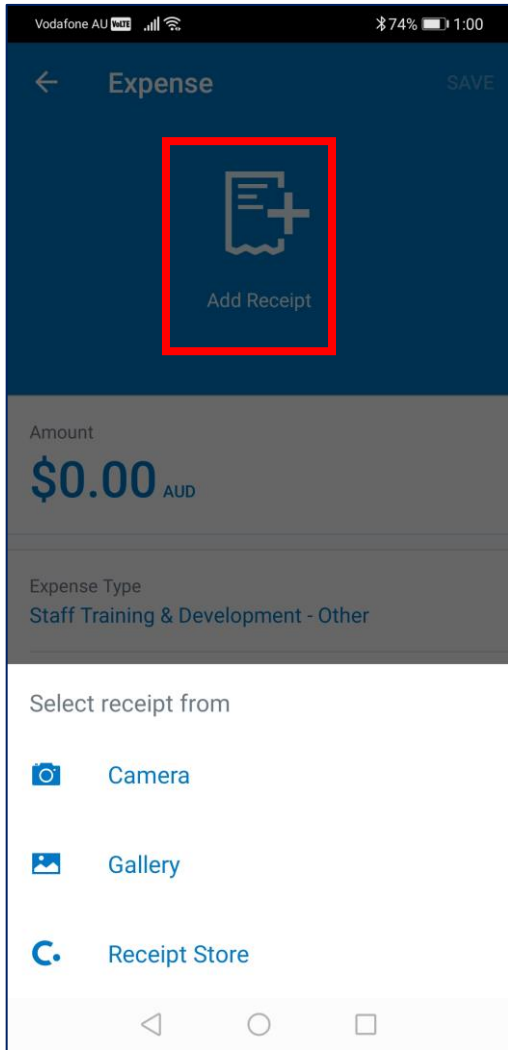
4. Select 'Save' to confirm the details entered for the expense type

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

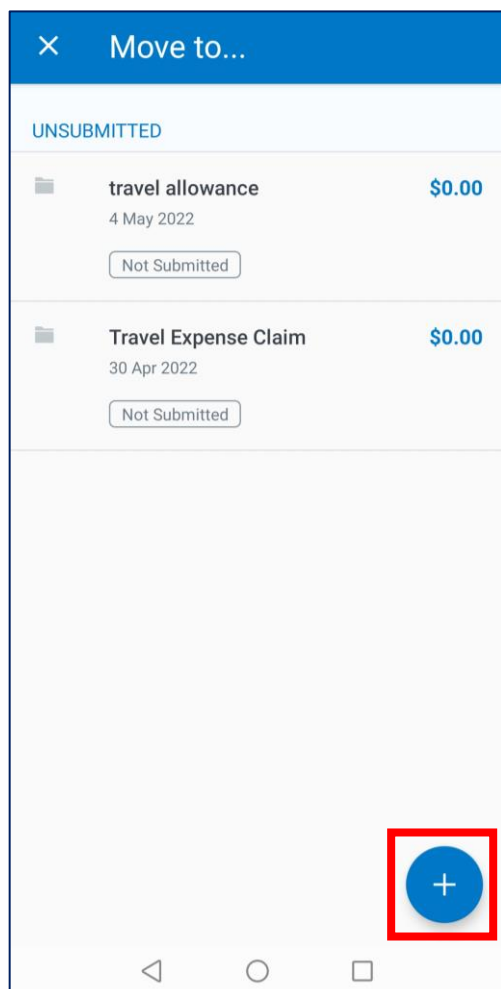6. Confirm all details of the expense are correct, and select 'Move to Claim'

MOVE TO CLAIM
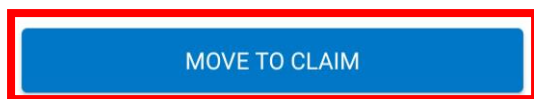
7. Select the add button to create a new claim

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

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

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
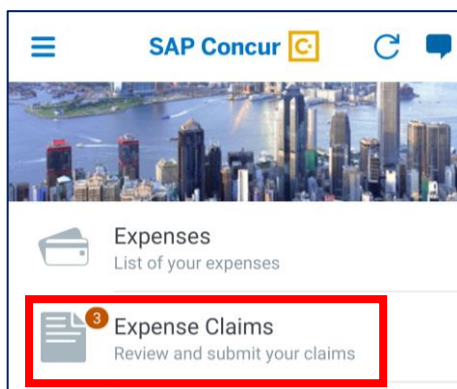
11. Select the outstanding unsubmitted claim
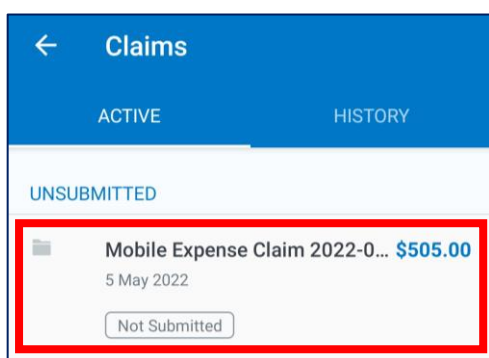
12. Review all the information entered in the details, expense, and receipts tabs, and then select 'Submit'

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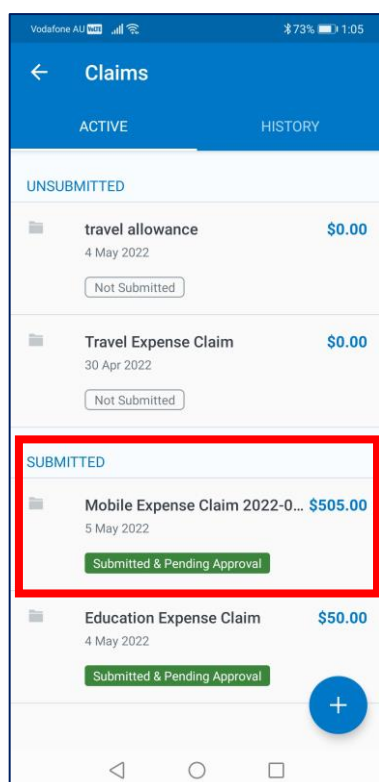
13. Review the User Electronic Agreement, and then select 'Submit

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

- 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.

- 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

Claim Details ⌄   Print ⌄   Manage Receipts ⌄   Travel Allowance ⌄

[Copy Claim]   [Submit Claim]

[Add Expense] [Edit] [Delete] [Copy] [Allocate] [Combine Expenses] [Move to ⌄]

☑	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Supplier Details ↑↓	Date ≡	Requested ↑↓
☑		Cash	Daily Allowance	Melbourne, Victoria	16/03/2022	AUD 36.80
☑		Cash	Daily Allowance (Incidentals)	Melbourne, Victoria	16/03/2022	AUD 29.20
☑		Cash	Daily Allowance	Melbourne, Victoria	15/03/2022	AUD 73.10
☑		Cash	Daily Allowance (Incidentals)	Melbourne, Victoria	15/03/2022	AUD 29.20
						AUD 168.30

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

- 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**.

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