



UNIVERSITY of HAWAII®
FOUNDATION

SAP Concur Invoice User Guide – UH Employees

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Introduction

Concur Invoice is a cloud-based tool that gives you one view to manage business payment requests. Submit payment requests and route for electronic approval through Concur Invoice, with the ability to monitor and track the request status as it progresses through the payment process. Concur Invoice is a product in the SAP Concur suite of products, created by the software company, SAP.

Requesting Access to Concur Invoice

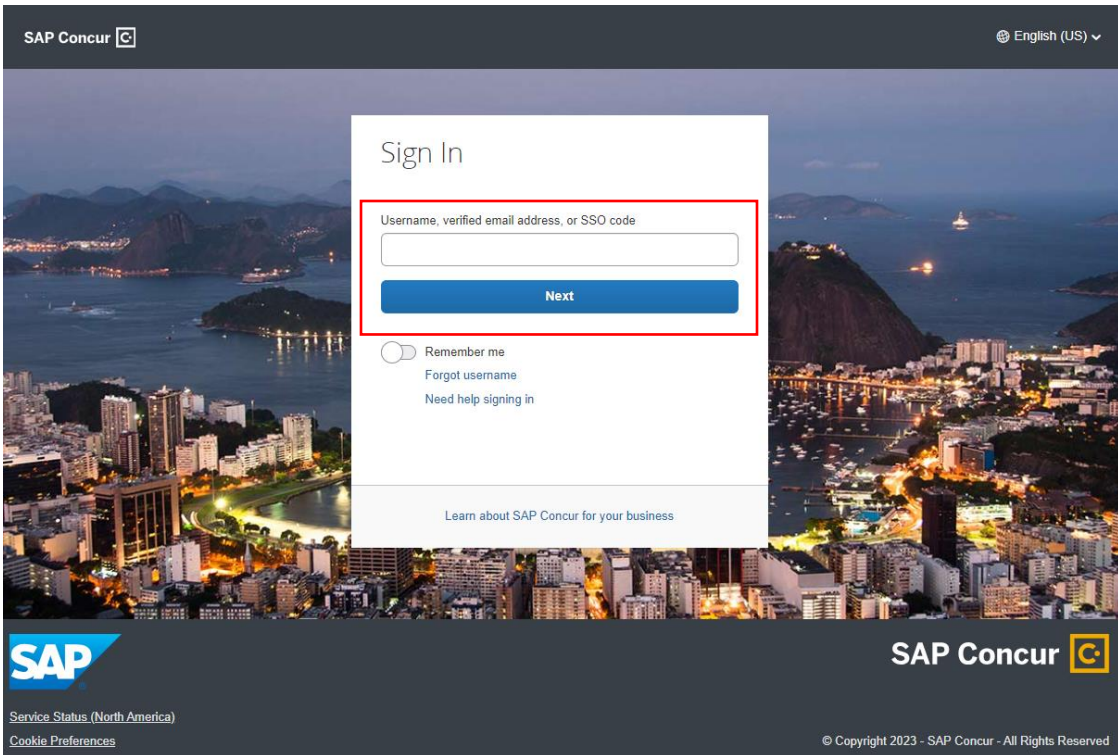
All active account administrators and support staff will automatically be granted access to Concur Invoice.

For those that are not listed as an account administrator or support staff but needs to have access to Concur, please submit a Concur Invoice Access Request at <https://www.uhfoundation.org/resources/forms/concur>.

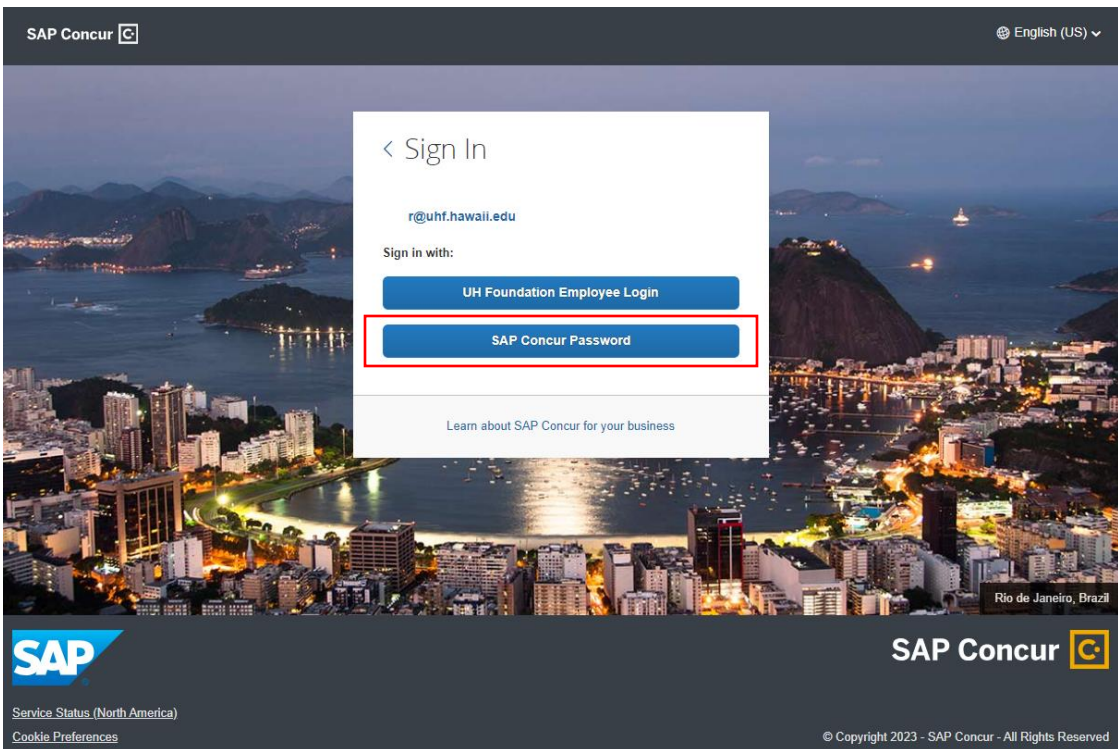
Signing Into Concur Invoice

1. To sign in to SAP Concur, go to <https://www.concursolutions.com/>.
2. On the Sign In screen, enter your Username, which is your UH username followed by @uhf.hawaii.edu (xxx@uhf.hawaii.edu), and then click **Next**..

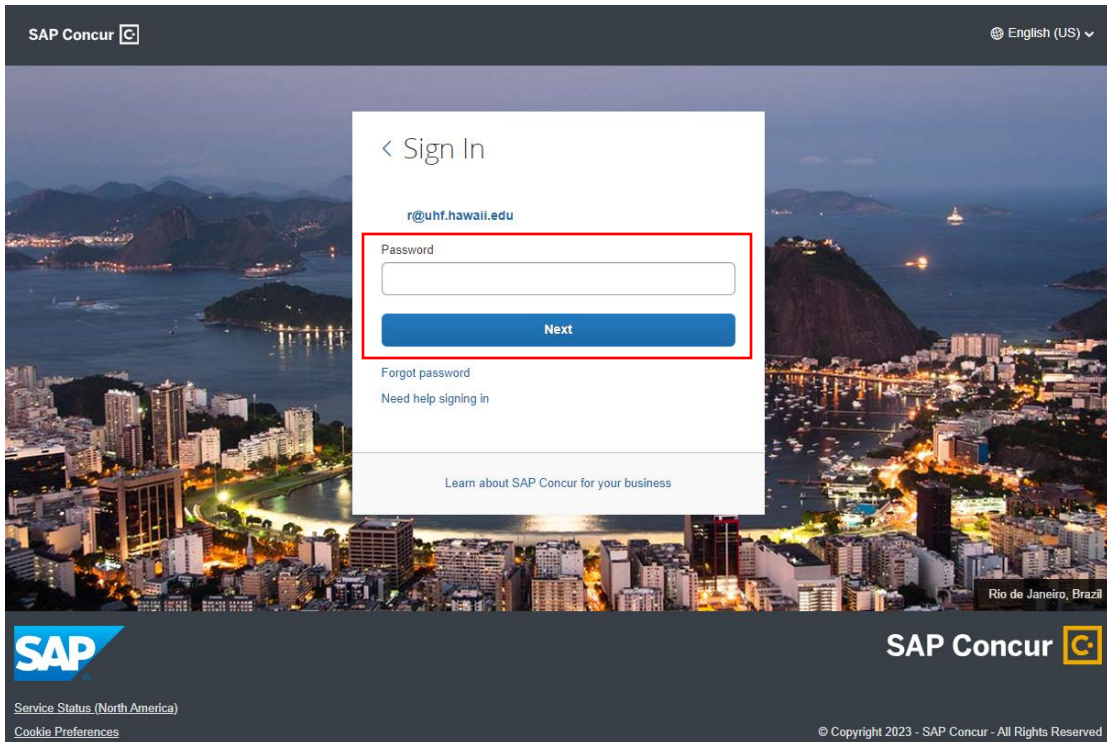
IMPORTANT: If you do not include "uhf" in your Concur Username, you will not be signed into UH Foundation's Concur site and you may be signed into UH's Concur site instead.



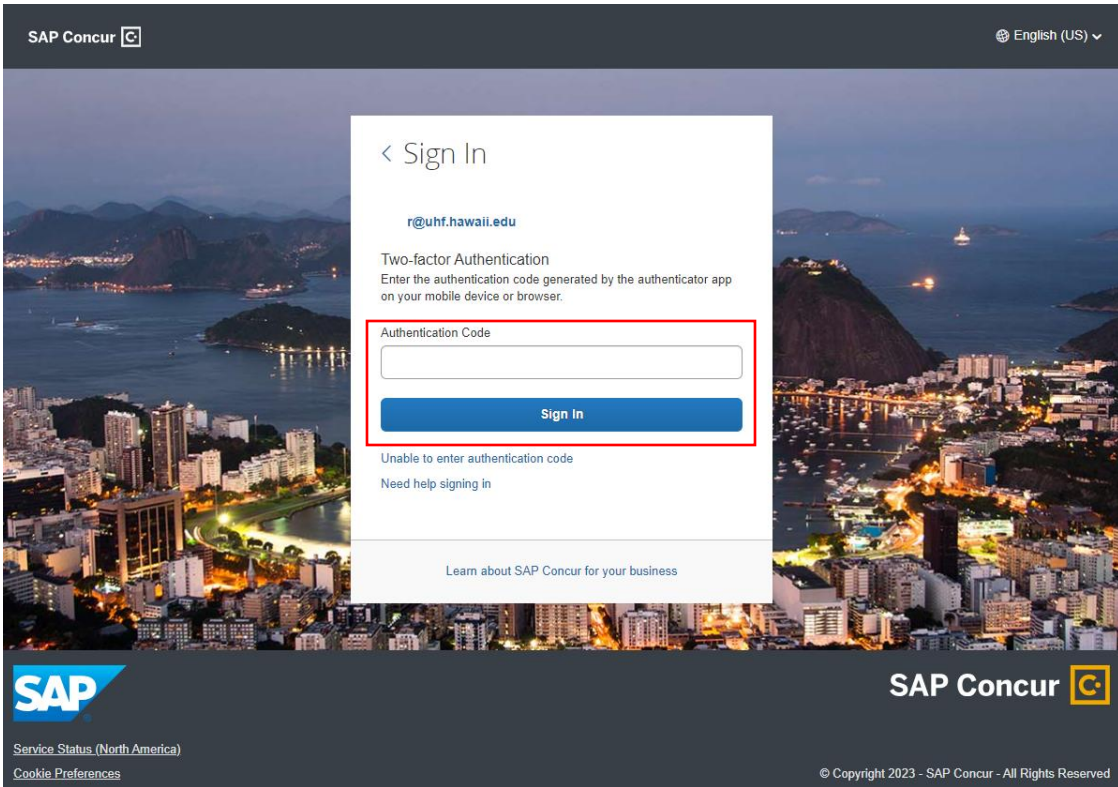
3. On the next page, select the **Sign in with SAP Concur Password** option.



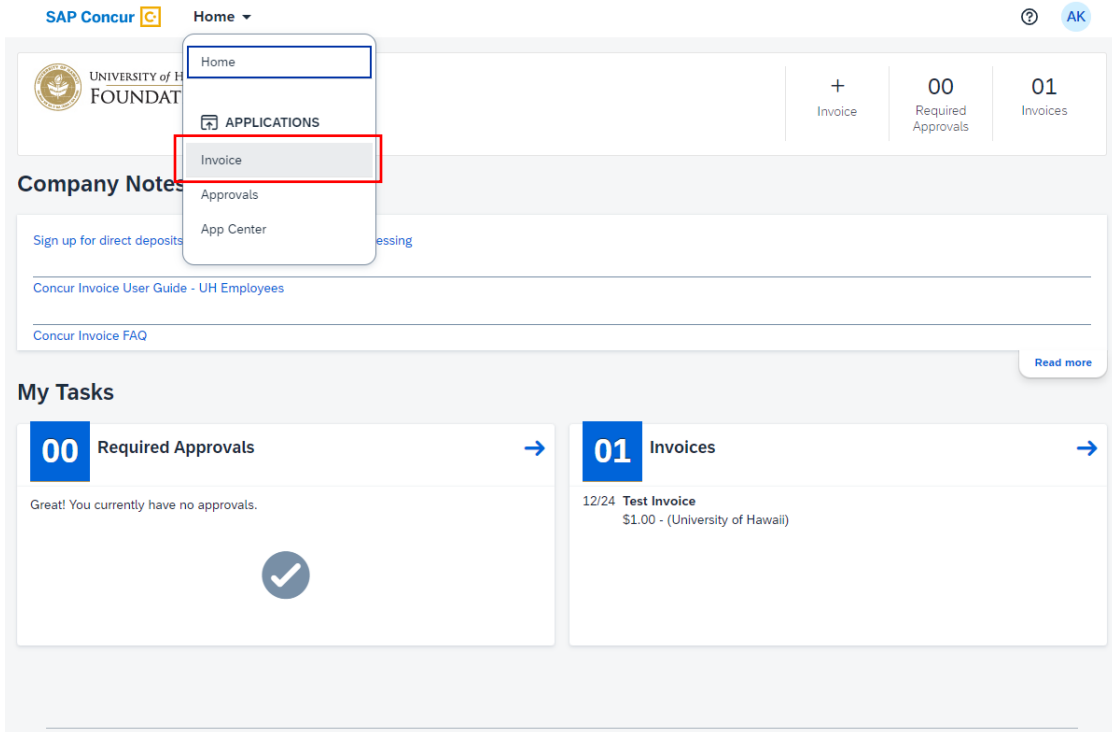
4. Enter your SAP Concur Password and click **Next**. *Note: When signing into Concur for the first time, you will need to select “Forgot password” to reset your password.*



5. Enter the two-factor authentication (2FA) code from your authenticator app and click **Sign In**. *Note: If it is your first time signing into Concur, see the section [Setting up Two-Factor Authentication \(2FA\)](#). To reset the 2FA associated with your Concur account, select “Unable to enter authentication code.”*



6. Once on the **SAP Concur Home page**, you will see an overview of your invoices. Click **Home > Invoice** to manage your invoices.



Setting up Two-Factor Authentication (2FA)

When signing in for the first time using your SAP Concur Password, you will need to set up 2FA, which involves downloading an authentication app on either your mobile device or web browser. **IMPORTANT:** Please note that this additional 2FA setup is required by SAP and is separate from UH multi-factor authentication (MFA).

1. Go to <https://www.concursolutions.com/>.
1. On the Sign In screen, enter your Username, which is your UH username followed by @uhf.hawaii.edu (xxx@uhf.hawaii.edu), and then click **Next**
2. Select the **Sign in with SAP Concur Password** option
3. You will be prompted to set up 2FA:



The screenshot shows a mobile-style sign-in interface. At the top left is a back arrow and the text "Sign In". Below this is a blacked-out input field for the username. The main heading is "Set Up Two-factor Authentication", followed by a paragraph: "You must set up two-factor authentication to continue sign-in. Use your authenticator app (such as Microsoft Authenticator or Google Authenticator) to scan the QR code below." A QR code is displayed with the text "Sample QR code" overlaid in red. Below the QR code is a link: "Can't scan the QR code? Set up manually with a key". There is an input field for the "Authentication Code". A blue "Sign In" button is positioned below the input field. At the bottom of the form area is a link: "Need help signing in". A footer bar at the very bottom contains the text "Learn about SAP Concur for your business".

If you are using a mobile device to set up 2FA and have already downloaded an authenticator app, you can scan the QR code on the “Set Up Two-Factor Authentication” page to begin setting up 2FA for Concur. If you do not yet have an authenticator app set up, you can download one of the following suggested authenticator apps and then proceed to set up 2FA:

Duo (Mobile app)

1. Select **Add** account (+)
2. Select “**Use QR code**” and scan the QR code displayed in your computer browser window
3. Confirm the new account name and select **Save**
4. Type the account passcode from the Duo app into the Authentication Code field on your computer and select “**Sign In**”

Google Authenticator (Mobile app)

1. Select “**Add a code**” (+)
2. Select “**Scan QR code**” and scan the QR code displayed in your computer browser window

If you do not have a mobile device or prefer not to use one for this process, you can use an authenticator app in a web browser.

Google Authenticator (Desktop browser extension)

1. Open the Google Authenticator extension
2. Select the “**Scan QR Code**” icon
3. Click and drag your cursor to highlight the entire QR code displayed in your computer browser window

After 2FA setup is completed, you will then be able to log into Concur by opening your authenticator app and inputting the Authentication Code on the sign in page. *Should you need to reset the 2FA associated with your UHF Concur account, you may select the “Unable to enter authentication code” option on the sign in page and select Send to request a 2FA reset email. **Additional help for setting up 2FA and signing in is available by following the “Need help signing in” link on the sign in page.***

Resetting your SAP Concur Password

When signing in for the first time, you will need to select “Forgot password” to reset your password. You may use this option any time you need to perform a password reset.

1. Go to <https://www.concursolutions.com/>.

2. On the Sign In screen, enter your Username, which is your UH username followed by @uhf.hawaii.edu (xxx@uhf.hawaii.edu), and then click **Next**
3. Select the **Sign in with SAP Concur Password** option
4. Select "**Forgot password**"
5. Click "**Send**" to send an email with a link to reset your password
6. Check your UH email inbox for a password reset email from SAP and follow the provided instructions

Creating an Invoice from an Existing Vendor

You can manually create an invoice using an approved vendor that was added by your company.

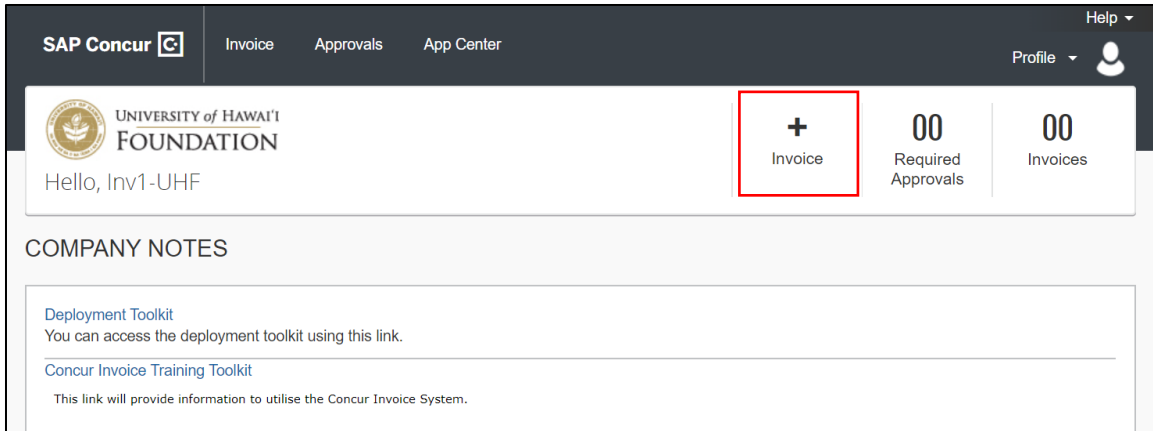
The basic steps in the invoice process are:

1. **Create** the invoice –Select or add a vendor, and then provide request-level information (such as the invoice name, invoice number and date, amounts, and comments).
2. **Itemize** the payment request – Select the expense type, such as "Computing Equipment."
3. **Distribute** or allocate the invoice across departments.
4. **Attach** an image of the invoice.
5. **Submit** the invoice.

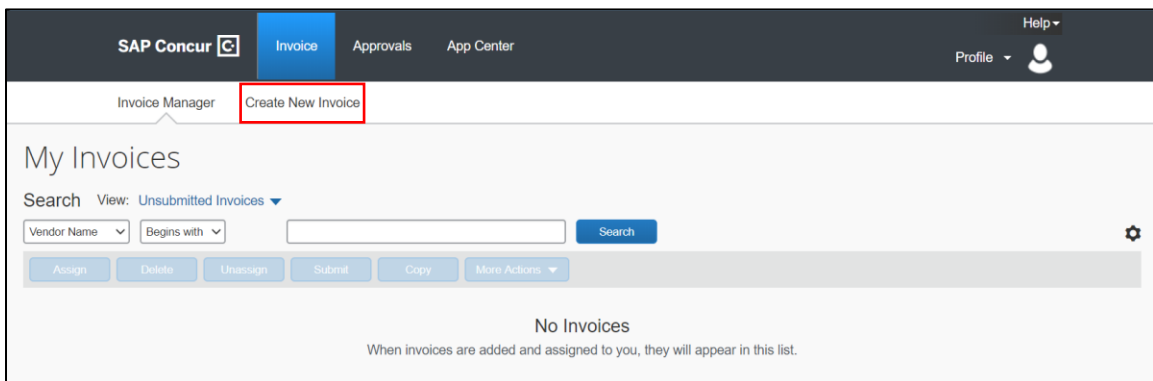
Step 1: Creating an invoice

1. There are a couple of ways to easily create an invoice.

On the **SAP Concur Home page** click **+ Invoice**



Or, go to the **Invoice Manager** page by clicking **Invoice**, and then you can click **Create New Invoice** on the submenu.



2. On the **Create New Invoice** page, use the **Search** fields to find and select the appropriate vendor or select it from the entire **Vendor List** by clicking the **Search** icon . Changing the search operator from **Begins with** to **Contains** will expand the search.

Invoice Manager Create New Invoice

Create New Invoice

Choose Policy and select a Vendor from the vendor list below.

Policy: *Test UHF Invoice Policy

Vendor List

Most Recently Used Request New Vendor Search: Vendor Name Begins with Advanced

Vendor Na...	Vendor Code	Account N...	Care of	Vendor Ad...	Remit Addr...	Remit Addr...	Remit Addr...	Remit Addr...	City	State/Provi...	Postal/Zip ...	Country
1132 Cafe ...	V051778			R1	701 Ilalo St...				HONOLULU	HI	96813	UNITED ST...
4Imprint	V022837			P1	25303 Netw...				CHICAGO	IL	60673-1253	UNITED ST...
808 Travel Inc	V037239			PR	429 Waika...				HONOLULU	HI	96817	UNITED ST...
May	V068697			PR					PEARL CITY	HI	96782	UNITED ST...
NEW VEN...	NEW VEN...			NEW VEN...								UNITED ST...
Sodexho In ...	V022838			R1	1951 East ...				HONOLULU	HI	96822	UNITED ST...

Page 1 of 1 | Displaying 1 - 6 of 6

Cancel

- Select the appropriate vendor from the list by double-clicking on the row. The vendor selected will be who the payment will be made out to. If information on the vendor record needs to be updated, such as their address, click on **Request New Vendor** instead. See the section on [Requesting a New Vendor](#).

To request a reimbursement for an expense you paid out-of-pocket for, select yourself as the vendor.

- On the **Enter Invoice Details** page, complete the required fields (indicated with a red bar) and optional fields as directed by your company, and then click **Save**.

Create New Invoice

Enter Invoice Details

Vendor Information: Sodexho Inc & Affiliates, 1951 East West Road, HONOLULU HI 96822, Vendor Code: V022838, Address Code: R1, Currency: USD-US, Dollar

Invoice Details

Policy: *Test UHF Invoice Policy, Invoice Name: ABC event catering order, Business Purpose: Food order for ABC event held on 1/1, Invoice Number: XYZ123, PO Number: [?]

Invoice Date: 01/01/2020, 2nd Ref (16 Characters Max): ABC event, Check Description (will print on check stub): [?], Currency: USD-US, Dollar, Total Invoice Amount (incl S&T): 0.00

Shipping (Fiscal use only): 0.00, Tax (Fiscal use only): 0.00, Request Total: 0.00, Service Fiscal Year: 2020, Request #: [?]

Project Number: 1 (05040201) UHF Data & Tech, Unit: 2 (UHF) Univ of Hawaii Founde..., Campus: 3 (UHF) UH Foundation, Department: 4 (801) Administration, Project Approver 1: 5 (KOOC) Christine Koo

Project Approver 2: 6 (ONOU) Jason Ono, Comments: Some additional information

Save

Itemization Summary

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Unit Price	Total
No items found.					

Back to List

Invoice Name: Brief description of the invoice to be used as a reference in the system. Required.

Business Purpose: Description of the invoice details, including a business purpose consistent with UH Foundation expenditure policies. If your business purpose is longer than can be entered into the field, add additional information in the **Comments** field. Required.

Invoice Number: Invoice number indicated on the invoice. If there is no invoice (e.g. receipts for reimbursement), enter today's date in MMDDYYYY format. When uploading a copy of a paper receipt, please write "Submitted to UHF on <date>" on the paper receipt before scanning. Required.

PO Number: Enter the UH Foundation Purchase Order (PO) number if this invoice fulfills (fully or partially) a previously generated PO.

Invoice Date: The date of the invoice. Enter today's date if there's no invoice (e.g. receipts for reimbursement). Required.

2nd Ref: 16 character description of what this payment is for; appears in financial reports.

Check Description: Description of what this payment is for; printed on the check stub.

Currency: The currency the invoice is in. Defaulted to the US dollar (USD). Required.

Total Invoice Amount: The invoice total amount. Required.

Shipping: For UH Foundation Fiscal use only.

Tax: For UH Foundation Fiscal use only.

Request Total: Calculated field based invoice amount, shipping and tax.

Service Fiscal Year: The fiscal year (July 1 – June 30) the invoiced services were rendered in. Required.

Request #: System-assigned sequential number populated after the invoice is saved.

Project Number: The UH Foundation account number to be charged for this expense, *without* hyphens or spaces. Must select from the available options. Required.

Unit: The unit associated with the above account number. Must select the option presented. Required.

Campus: The campus associated with the above account number. Must select the option presented. Required.

Department: The department associated with the above account number. Must select the option presented. Required.

Project Approver 1: The first approver. Required.

Project Approver 2: The second approver. Required.

Comments: Additional notes or business purpose description overflow.

Step 2: Itemizing an invoice

You must itemize all invoices to show the goods or services received.

1. On the **Amount Remaining to be Itemized** page, select the appropriate expense type, such as **Furniture** and **Fixtures**.
2. In the **Add Item** section, complete all required fields (indicated with a red asterisk) and optional fields as directed by your company, and then click **Add**.
3. Continue adding items until all the items (expense types) are represented.
4. The **Amount Remaining to be Itemized** balance will be \$0.00 when all the items are correctly added.

Amount Remaining to be Itemized: \$337.11

No.	Expense Type	Line Description	Quantity	Unit Price	To
1	4503 - Protocol	Assorted pastries	150	3.25	\$487.50

Invoice Image Not Available

There is currently no invoice image available. Try again in a few minutes.

If significant time has elapsed, there may have been an error during the upload. The invoice image should be uploaded again. If the issue persists, review the Help for this feature, or contact your Application administrator.

If you use fax to add images, click the Print button, then choose the Fax Cover Page option. Print the cover page, then fax it and the applicable document to the fax number printed on the cover page. If significant time has elapsed, there may have been an error during the upload or the fax may have been sent incorrectly or may have been unreadable.

Add Item

No.	* Expense Type	* Line Description	* Quantity	* Unit Price	Total
2			1	\$0.00	\$0.00

Save Cancel

Expense Type: Object categorization of the expense line item. Required.

Line Description: Expense line item description. Required.

Quantity: Quantity of the expense line item. If there is no unit price, enter quantity and the entire line item total in the **Unit Price** field. Required.

Unit Price: Unit price of the expense line item. Required.

Total: Calculated field for the expense line item total (Quantity x Unit Price).

- To update a line item, select the appropriate check box next to the line item to edit. The selected line item details will appear in the **Edit Item** section, update and click **Update**.

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Unit Price	To	
<input type="checkbox"/>	1	4503 - Protocol	Assorted pastries	150	3.25	\$487.50
<input type="checkbox"/>	2	4503 - Protocol	Coffee	4	75.00	\$300.00
<input checked="" type="checkbox"/>	3	4503 - Protocol	Sales tax	1	37.11	\$37.11

Invoice Image Not Available

There is currently no invoice image available. Try again in a few minutes.

If significant time has elapsed, there may have been an error during the upload. The invoice image should be uploaded again. If the issue persists, review the Help for this feature, or contact your Application administrator.

If you use fax to add images, click the Print button, then choose the Fax Cover Page option. Print the cover page, then fax it and the applicable document to the fax number printed on the cover page. If significant time has elapsed, there may have been an error during the upload or the fax may have been sent incorrectly or may have been unreadable.

Edit Item

No.	Expense Type	Line Description	Quantity	Unit Price	Total
3	4503 - Protocol	Sales tax	1	\$37.11	\$37.11

Save **Cancel**

- Click **Save**.

Step 3: Distributing an invoice

After creating a new invoice, you can distribute the amount of the expense. Distributing allows you to allocate a portion of the transaction to different accounts (project numbers).

- In the **Itemization Summary** area of the page, select the appropriate check boxes (on the left side of the page) for the items that you want to distribute.
- Click **Distribute**, and then click **Distribute Selected Items**.

Itemization Summary

Add Item **Delete Item** **Edit** **Distribute** Show Distributions | Amount Remaining to be Itemized: \$0.00

No.	Expense	Distribute Selected Items	Line Description	Quantity	Unit Price	Total
<input type="checkbox"/>	4503 (System Default)	<input type="checkbox"/>	Assorted pastries	150	\$3.25	\$487.50
<input type="checkbox"/>	4503 - Protocol	<input type="checkbox"/>	Coffee	4	\$75.00	\$300.00
<input checked="" type="checkbox"/>	4503 - Protocol	<input checked="" type="checkbox"/>	Sales tax	1	\$37.11	\$37.11

Account Code: 4503 (System Default) | Distribution Code: 05040201-LHF-LHF-901-KDOCC-ONOU-GEN | Percentage: 100 | Net Amount: \$300.00 | Gross Amount: \$300.00

- On the **Distribute Selected Items** page, click **Distribute By**, and then select **Percentage** or **Amount** as the distribution type. Note that working with **Amounts** may be easier to work with over **Percentages**.
- Click **Add**.

With each additional allocation, the system automatically distributes the percentage evenly between the departments. You can manually adjust the **Percentage** or **Amount** fields as needed.

Enter the additional account information to distribute to.

Click **Save** once done and the **Remaining to distribute** is \$0.00 (0%).

The screenshot shows a web interface titled "Distribute Selected Items". It has two tabs: "Distributions" and "Distribution Summary". The "Distributions" tab is active. At the top right, it displays "Total: \$300.00 | Distributed: \$300.00 (100%) | Remaining: \$0.00 (0%)". Below this is a toolbar with buttons: "Distribute By" (dropdown), "Add", "Delete", "Favorites" (dropdown), and "Add to Favorites". A table follows with columns: Amount, Project Num..., Unit, Campus, Department, Project Appro..., Project Appro..., Division, and Distribution Code. Two rows are visible, each with a checkbox, a dollar amount (\$150.00), and various alphanumeric codes. At the bottom right, there are "Cancel" and "Save" buttons.

Amount/Percentage: Amount or percentage to distribute depending which **Distribute By** method is selected.

Project Number: The UH Foundation account number to be charged for this expense, *without* hyphens or spaces. Must select from the available options. Required.

Unit: The unit associated with the above account number. Must select the option presented. Required.

Campus: The campus associated with the above account number. Must select the option presented. Required.

Department: The department associated with the above account number. Must select the option presented. Required.

Project Approver 1: The first level approver. Generally the department head for UH Foundation operating accounts. Required.

Project Approver 2: The second level approver. Generally the next level supervisor. Required.

Step 4: Attaching an image to an invoice

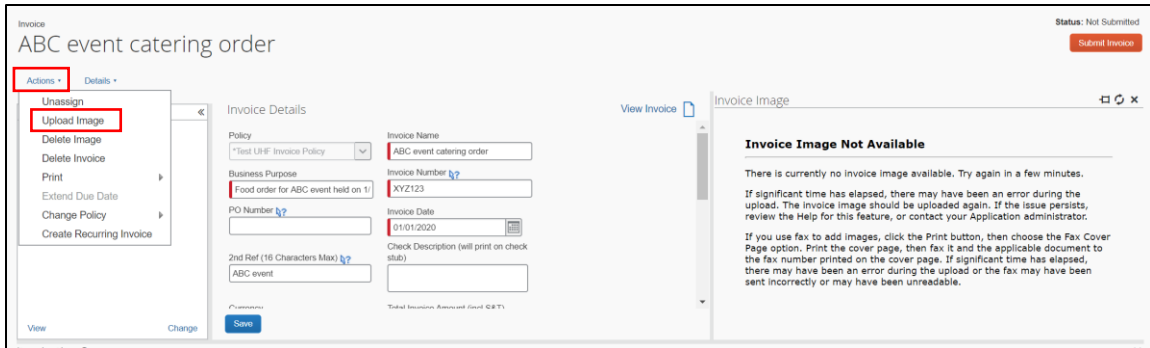
Per the UH Foundation [Account Administration Policy](#), it is required to upload a digital copy of the invoice, receipt(s) and any necessary supporting documentation. When uploading a copy of a paper receipt, please write "Submitted to UHF on <date>" on the paper receipt before scanning.

IMPORTANT: Do not upload any documents that contain sensitive information, such as social security numbers.

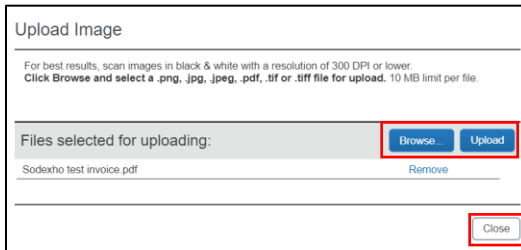
If your payment request requires you to submit required or supporting documents that contain sensitive information (e.g. social security numbers, etc.), please instead upload the documents to our secure file sharing site using the appropriate link below:

- Student Aid payments: <https://www.uhfoundation.org/student-aid-documents-upload>
- All others: <https://www.uhfoundation.org/payment-request-documents-upload>

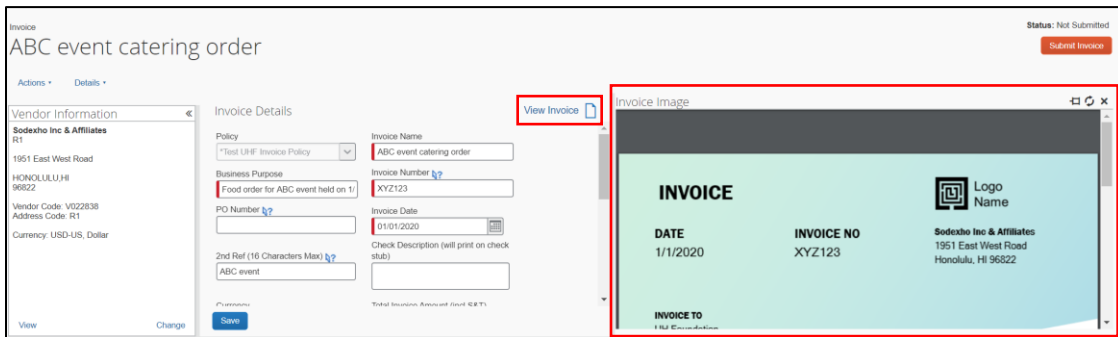
1. On the **Invoice** page, go to **Actions** then select **Upload Image**.



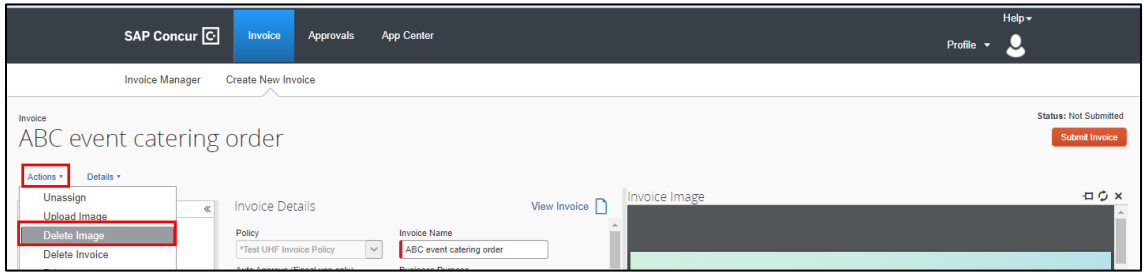
2. Select the invoice, receipt(s) and any necessary supporting documentation to upload by clicking **Browse**. Multiple documents can be uploaded at once. Once all documentation to upload has been selected, click **Upload**. Once all documents have been uploaded, click **Close**. Images can be in .png, .jpg, .pdf, .tif or .tiff file formats. The size limit is 10 MB per file.



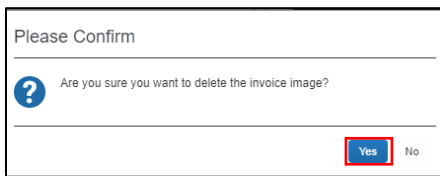
3. The upload documentation will appear in the **Invoice Image** pane. If you do not see the document(s), click on **View Invoice** in the **Invoice Details** section.



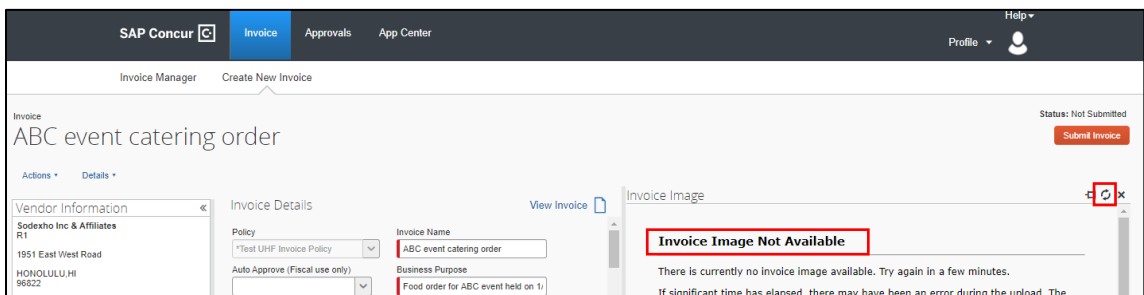
If the wrong invoice image is accidentally uploaded, you can delete the uploaded invoice image by going to **Actions** then **Delete Image**.



Confirm that you want to delete the invoice image by clicking **Yes**.



The invoice image preview will still be displayed in the **Invoice Image** section. However, clicking the **Refresh** icon in the **Invoice Image** section will display an **Invoice Image Not Available** message that confirms that the invoice image has been deleted.

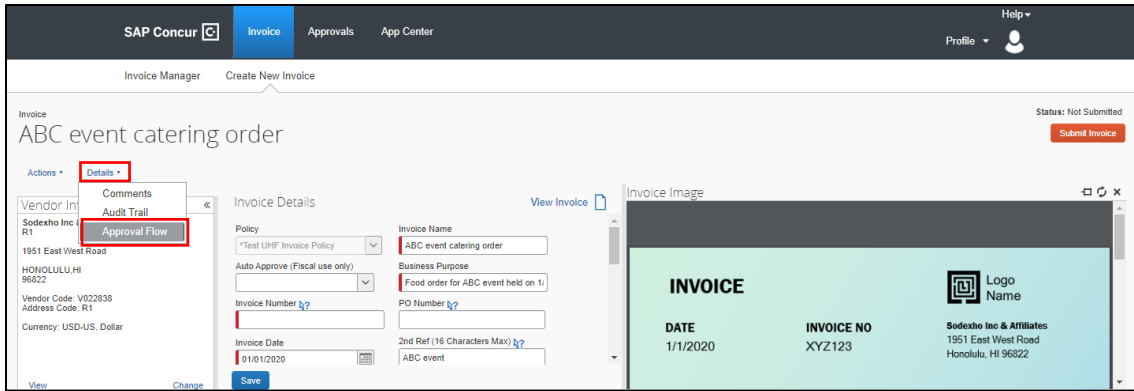



Step 5: Adding Additional Approvers

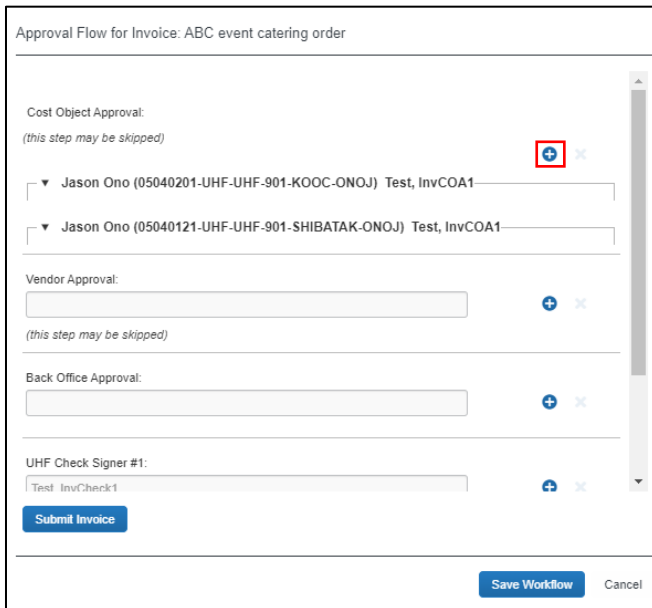
If your business process requires that approvers in addition to the selected approver 1 and 2 to review the invoice and approve, you can add additional approvers before submitting the invoice.

It is required that all additional approvers have access to Concur Invoice, see the [Requesting Access to Concur Invoice](#) section.

1. On the **Invoice** page, go to **Details** then click on **Approval Flow**.



2. In the **Approval Flow** window, click on the **Add** icon  in the **Cost Object Approval** section.



In the **User-Added Approver** field, start typing the last name of the additional approver, clicking on the appropriate row. Additional approvers must be able to login and access **Concur Invoice**.

Approval Flow for Invoice: ABC event catering order

User-Added Approver:

test

Test, Inv1-UHF (WFRequestor@uhfoundation.org)
Employee ID: inv1
Logon ID: inv1@uhfoundation.org

Test, Inv2-UHF (WFDelegate1@uhfoundation.org)
Employee ID: inv2
Logon ID: inv2@uhfoundation.org

Test, Inv3-UH (inv3@uhfoundation.org)
Employee ID: inv3
Logon ID: inv3@uhfoundation.org

Test, Inv4-UH (inv4@uhfoundation.org)
Employee ID: inv4
Logon ID: inv4@uhfoundation.org



Search Approvers By

(this step may be skipped)

Back Office Approval:

Submit Invoice

Save Workflow Cancel

Click the **Add** icon  to continue to add additional approvers. Click the **Delete** icon  symbol to remove any additional approvers you added. Once done, click **Save Workflow**.

Approval Flow for Invoice: ABC event catering order

User-Added Approver:

User-Added Approver:

Test, Inv2-UHF (WFDelegate1@uhfoundation.org)

Cost Object Approval:

(this step may be skipped)

Jason Ono (05040201-UHF-UHF-901-KOOC-ONJ) Test, InvCOA1

Jason Ono (05040121-UHF-UHF-901-SHIBATAK-ONJ) Test, InvCOA1

Vendor Approval:

Submit Invoice

Save Workflow Cancel

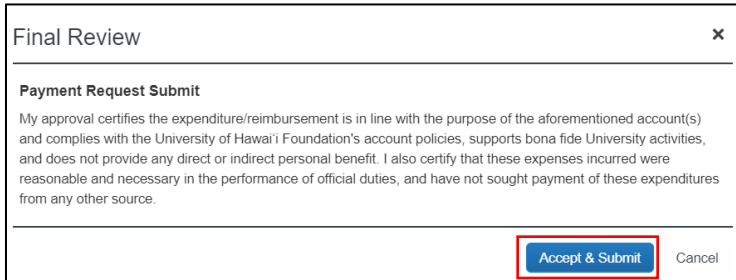
Step 6: Submitting an invoice

You must submit the invoice once complete to have the invoice routed for approvals and processing.

1. On the **Invoice** page, click **Submit Invoice**.



2. Acknowledge the pop-up certifying the expenditures/reimbursement by clicking on **Accept & Submit** to being invoice processing.

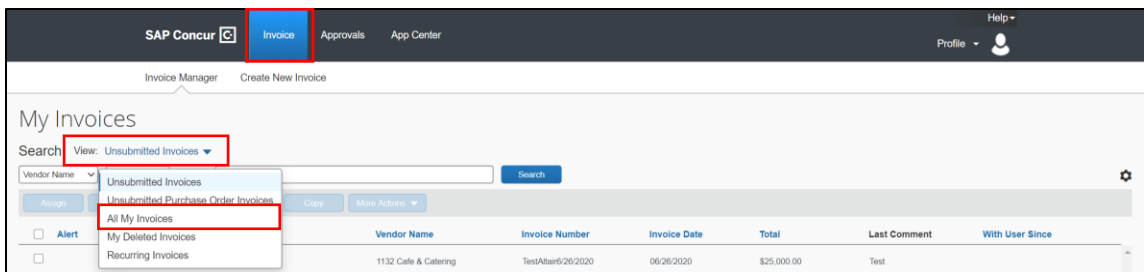


Creating a Recurring Invoice

You can convert any invoice (submitted or unsubmitted) into a recurring invoice. You can use this feature for any type of recurring goods or services that you receive, such as a monthly bills for subscription services.

To create a recurring invoice

1. On the **SAP Concur** home page, from the menu bar, click **Invoice**.
2. From the **Invoice Manager** submenu, change the **View** to **All My Invoices**.



3. Click the **Name** of the invoice that you want to convert to a recurring invoice.

Alert	Image	Invoice Name	Vendor Name	Invoice Number	Invoice Date	Approval Status	Action Due Date	Payment Status	Total	Last Comment	With User Since
<input type="checkbox"/>		ABC event catering order	Sodexo Inc & Affiliates	XYZ123	01/01/2020	Pending Cost Object Approval	07/04/2020	Not Paid	\$824.61	Some additional information	06/27/2020

- On the **Invoice** page, click the **Actions** dropdown menu, and then select **Create Recurring Invoice**.

The screenshot shows the 'Create New Invoice' interface. The invoice title is 'ABC event catering order'. The status is 'Pending Cost Object Approval'. An 'Actions' dropdown menu is open, listing options: Upload Image, Delete Image, Recall Invoice, Delete Invoice, Print, Extend Due Date, and 'Create Recurring Invoice' (which is highlighted with a red box). The 'Invoice Details' section includes fields for Policy (Test UFF Invoice Policy), Invoice Name (ABC event catering order), Business Purpose (Food order for ABC event held on 1/1/2020), Invoice Number (XYZ123), and PO Number.

After you create a recurring invoice, you can modify the payment schedule by clicking **Edit Recurring Invoice**.

- In the **Recurring Invoice Details** window, select the frequency for the recurring invoice from the dropdown list.
- Select when you want the recurring invoice to be due from the **What day(s) of the month is the payment for the recurring invoice due** from the dropdown list.
- Select the appropriate option for how to manage the invoice number, **Blank out Invoice Number** will most likely be the most appropriate to avoid duplicate invoice number warnings.
- Select the **Start** and **End** dates for when this recurring request will be effective, and then click **Save**.

Recurring Invoice Details

What is the frequency of this recurring invoice?

Monthly

What day(s) of the month is the payment for this recurring invoice due?

10

How should the Invoice Number be managed?

Copy Invoice Number from current invoice

Copy Invoice Number from current invoice, but add auto-incrementing value as a suffix(ex. 1234 becomes 1234-001, 1234-002, etc)

Blank out Invoice Number

When is this recurring invoice effective?

Start: 07/01/2020 End: 6/30/2022

Note: The recurring invoices will be created 14 days prior to their scheduled payment due date

Save Cancel

The system duplicates the recurring invoice, which appears on the **Recurring Invoice** page.

- To view the invoice, click the **Invoice Manager** submenu. Change the **View** select **Recurring Invoices**.

You will see the new recurring invoice in the list. This duplication occurs on a regular basis specified by the offset value (the default is 14 days prior to the payment date).

SAP Concur Invoice Approvals App Center Help

Invoice Manager Create New Invoice Profile

My Invoices

Search View: Recurring Invoices

Assign Delete Unassign Submit Copy More Actions

<input type="checkbox"/>	Alert	Image	Invoice Name	Vendor Name	StartDate	EndDate	Previous Payment Date	Next Payment Date	Frequency	Day Of Month	Total
<input type="checkbox"/>			ABC event catering order	Sodexo Inc & Affiliates	07/01/2020	06/30/2022		07/01/2020	Monthly	10	\$824.61

Displaying 1 - 1 of 1

Submitting Student Aid Payment Requests

To submit student aid payments:

1. Concur Invoice should only be used for issuing checks directly to students (e.g. awards, grants, reimbursements, etc.). Please continue to use the UHF Payment Request Form for Student Aid, located on our [website](#).
2. Scholarships and Scholarship portions of Fellowships should still be processed through Star Giving Tree or Banner as usual.
3. If you want a check to go to you and not the student, when choosing a Vendor ID, please make sure you choose the vendor or create the vendor with the students name with your department address – making sure to indicate the full address
4. If submitting multiple check requests for the same student and would like separate checks issued, please make a note in the comments, otherwise one check will be issued.
5. If you have any sensitive information regarding students or student aid, like WH-1's or international paperwork, please don't upload them to Concur Invoice. Please instead upload the documents to our secure file sharing site by using the following link.

<https://www.uhfoundation.org/student-aid-documents-upload>

To split payments between Fall and Spring semesters:

1. Fill out the UHF Payment Request Form for Student Aid form as normal for a split payment, making sure to fill in the total amount and checking the split payment option.
2. Once the invoice is inputted into Concur Invoice (see the [Creating an Invoice from an Existing Vendor](#) section), make sure to put the **Total Invoice** amount as only the Fall half of the scholarship.

Split Payment Test 8.17 Fall Payment

Vendor Information: Concur Invoice Test PR, 1314 S King St Suite B, HONOLULU, HI 96814, Vendor Code: V070089, Address Code: PR, Currency: USD-US, Dollar

Invoice Details: Check Description: Split Payment Test 8.17, Currency: USD-US, Dollar, Total Invoice Amount (incl S&T): \$5,000.00, Shipping: 0.00, Request Total: 0.00

PAYMENT INFORMATION: UHF Account # 12345678, Title: Test Scholarship Account, Academic Year: 2020-2021, Total Award \$10,000, Scholarship, Fellowship, Grant, Award, Reimbursement

APPLICANT INFORMATION: Name: Olegario Tanya Ms., Last: Olegario, First: Tanya, M.I.: Ms., M/Mrs/Ms

No.	Expense Type	Line Description	Quantity	Unit Price	Total
1	4517 - Student Grants	Test Split Payment	1	\$5,000.00	\$5,000.00
Account Code: 4517 [System Default]		Distribution Code: 12301452-ENGR-MJA-605-BMORIOKA-CMATSUZA-GEN	Percentage: 100	Net Amount: \$5,000.00	Gross Amount: \$5,000.00

3. When inputting the **Invoice Name** and **Invoice Number**, make sure to follow the name/number by putting in “Fall Payment.”

Split Payment Test 8.17 Fall Payment Submit Invoice

Actions • Details •

Vendor Information

Concur, Invoice Test
PR
1314 S King St Suite B
HONOLULU HI
96814
Vendor Code: V070089
Address Code: PR
Currency: USD-US, Dollar

View Change

Invoice Details

Policy: *Test UHF Invoice Policy

Invoice Name: Split Payment Test 8.17 Fall Payment

Auto Approve (Fiscal use only): No

Business Purpose: Split Payment Test 8.17

Invoice Number: Split Payment Test 8.17 Fall Payment

Save

Invoice Image

FOUNDATION

PAYMENT INFORMATION

UHF Account #: 1000000 Title: Test Scholarship Account
Academic Year: 2020-2021 Total Award \$ 10,000 Scholarship Fellowship Grant
 Award Reimbursement

*Please indicate below if for cost of attendance (e.g. tuition, books, fees, etc.) or research related costs toward degree. For costs of attendance, payment is paid through student Banner account. For research, UHF will process a check to student.

Payment: Year (split payment: Fall & Spring) Fall Only Spring Only Summer Only

APPLICANT INFORMATION

Name: Olegario Tanya Ms.
Last First M.I. Mr/Ms/Ms

Itemization Summary

Add Item Delete Item Edit Distribute • Show Distributions Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Unit Price	Total	
1	4517 - Student Grants	Test Split Payment	1	\$5,000.00	\$5,000.00	
		Account Code: 4517 (System Default)	Distribution Code: 12001452-ENGN-MA-005-BMORIOKA-CMATSUA-GEN	Percentage: 100	Net Amount: \$5,000.00	Gross Amount: \$5,000.00

4. Next, copy the invoice. See the [Copying an Invoice](#) section.

My Invoices

Search View: All My Invoices

Vendor Name Begins with Search

Assign Delete Unassign Submit **Copy** More Actions

Alert	Image	Invoice Name	Vendor Name	Invoice Number	Invoice Date	Approval Status	Action Due Date	Payment Status	Total	Last Comment	With User Since
<input checked="" type="checkbox"/>		Split Payment Test 8.17 Spring Payment	Concur, Invoice Test	Split Payment Test 8.17 Spring Payment	08/17/2020	Sent Back To Employee Test, Inv1-UHF		Not Paid	\$5,000.00	use for testing	

5. An error will be displayed indicating that you have the same invoice number. Change **Invoice Name** and **Invoice Number** ending from “Fall Payment” to “Spring Payment” and re-upload the backup documents, and **Submit** the invoice.

Invoice Copy of (Split Payment Test 8.17 Fall Payment) Status: Not Submitted Submit Invoice

Actions • Details • Hide Exceptions

Exceptions

Invoice This is a duplicate invoice number, please research before processing.

Vendor Information

Concur, Invoice Test
PR
1314 S King St Suite B
HONOLULU HI
96814
Vendor Code: V070089
Address Code: PR
Currency: USD-US, Dollar

View Change

Invoice Details

Policy: *Test UHF Invoice Policy

Invoice Name: Copy of (Split Payment Test 8.17 Fall Payment)

Auto Approve (Fiscal use only): No

Business Purpose: Split Payment Test 8.17

Invoice Number: Split Payment Test 8.17 Fall Payment

Invoice Date: 08/17/2020

2nd Ref (16 Characters Max)

Check Description (will print on check stub)

Save

Invoice Image

Invoice Image Not Available

There is currently no invoice image available. Try again in a few minutes.

If significant time has elapsed, there may have been an error during the upload. The invoice image should be uploaded again. If the issue persists, review the Help for this feature, or contact your Application administrator.

Itemization Summary

Add Item Delete Item Edit Distribute • Show Distributions Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Unit Price	Total	
1	4517 - Student Grants	Test Split Payment	1	\$5,000.00	\$5,000.00	
		Account Code: 4517 (System Default)	Distribution Code: 12001452-ENGN-MA-005-BMORIOKA-CMATSUA-GEN	Percentage: 100	Net Amount: \$5,000.00	Gross Amount: \$5,000.00

Invoice: Split Payment Test 8.17 Spring Payment Status: Not Submitted Submit Invoice

Vendor Information: Concur, Invoice Test PR, 1314 S King St Suite B, HONOLULU, HI 96814, Vendor Code: V070089, Address Code: PR, Currency: USD-US, Dollar

Invoice Details:

- Policy: *Test UHF Invoice Policy
- Invoice Name: Split Payment Test 8.17 Spring Payr
- Auto Approve (Fiscal use only): No
- Business Purpose: Split Payment Test 8.17
- Invoice Number: Split Payment Test 8.17 Spring Payr
- PO Number: []
- Invoice Date: 08/17/2020
- 2nd Ref (16 Characters Max): []

Itemization Summary:

No.	Expense Type	Line Description	Quantity	Unit Price	Total
1	4517 - Student Grants	Test Split Payment	1	\$5,000.00	\$5,000.00

Payment Request Form for Student Aid Recipients (University of Hawaii Foundation) is displayed in the Invoice Image window.

6. The approver will be notified of the pending approval. The Fall and Spring payments will be clearly indicated on their **Approvals Home** page.

SAP Concur | Invoice | Approvals | App Center Profile

Approvals Home | Invoices

Approvals

Invoices

Invoice Name	Employee Name	Submit Date	Invoice Date	Total
Split Payment Test 8.17 Fall Payment	Test, Inv1-UHF	08/18/2020	08/17/2020	\$5,000.00
Split Payment Test 8.17 Spring Payment	Test, Inv1-UHF	08/18/2020	08/17/2020	\$5,000.00

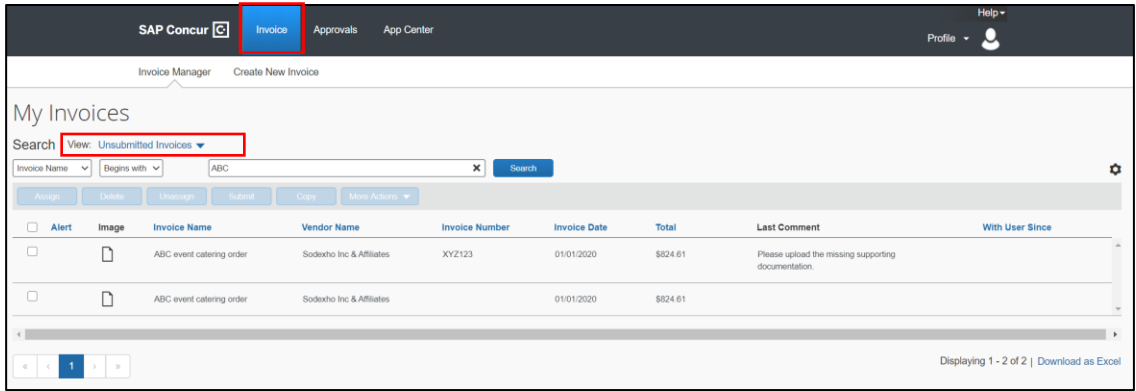
Copying an Invoice

You can make a copy of an existing invoice to help minimize entry.

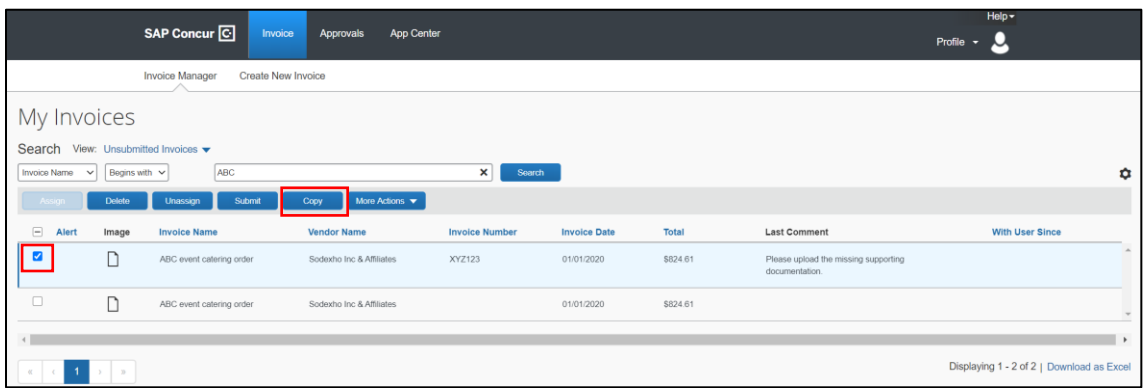
To copy an invoice

1. On the **SAP Concur** home page, from the menu bar, click **Invoice**.

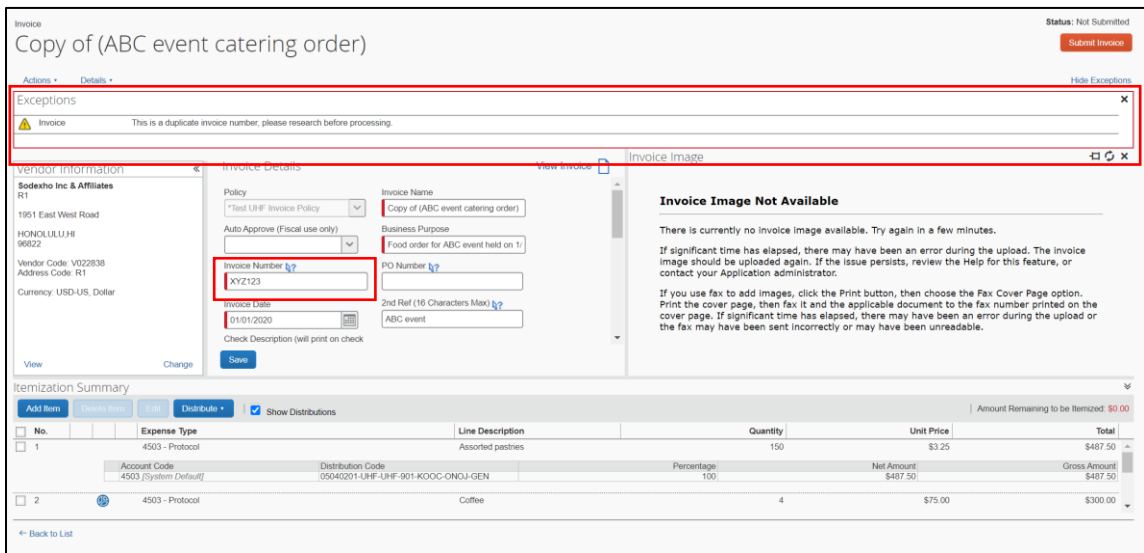
From the **Invoice Manager** submenu, change the **View** to **All My Invoices** and locate the invoice you want to copy.



2. Check the box next to the invoice that you want to copy and click **Copy**.



3. Update the **Invoice Details** of the copied invoice as necessary. Note that there may be a duplicate invoice number warning, be sure to update the **Invoice Number** for the new instance of the invoice, and then click **Save**.



4. Upload an image of the new invoice, receipt(s) and any necessary supporting documentation by going to **Actions** then select **Upload Image**. When uploading a

copy of a paper receipt, please write "Submitted to UHF on <date>" on the paper receipt before scanning.

5. **Submit** the invoice.

Approving an Invoice

As an Invoice approver, you can review an invoice sent to you, and then:

- Approve the invoice.
- Attach additional receipt images or documentation to the invoice.
- Send an invoice back to the employee to modify, and then resubmit the invoice.

To approve an invoice

1. On the **SAP Concur** home page, in the **My Tasks** section, click the **Required Approvals** heading or click on the specific invoice listed in that section.

You can also click the **Approvals** tab at the top of the home page.

The screenshot displays the SAP Concur user interface. At the top, the navigation bar includes 'SAP Concur', 'Invoice', 'Approvals' (highlighted with a red box), and 'App Center'. The user is identified as 'InvCOA1' from the 'UNIVERSITY of HAWAII FOUNDATION'. A dashboard shows '02 Required Approvals' and '00 Invoices'. The 'MY TASKS' section contains two cards: 'Required Approvals' (with a '02' badge and a red box around it) and 'Invoices' (with a '00' badge). The 'Required Approvals' card lists two items: 'Inv1-UHF T. | ABC event catering order \$824.81 — Invoice' and 'Inv1-UHF T. | Paul - TEST WF TIME OUT \$100.00 — Invoice'. The 'Invoices' card states 'You currently have no active invoices.' The SAP logo and 'SAP Concur' branding are visible at the bottom.

- On the **Approvals** page, double click on the invoice row to open the invoice. After reviewing the invoice details and uploaded documentation, you can **Send Back** or **Approve** invoices.

Invoice Name	Employee Name	Submit Date	Invoice Date	Total
ABC event catering order	Test, Inv1-UHF	06/27/2020	01/01/2020	\$824.61
Paul - TEST WF TIME OUT	Test, Inv1-UHF	06/18/2020	06/08/2020	\$100.00

- To review the details of the invoice, double-click the appropriate invoice, review it for accuracy, and then click **Approve**. If the total for any account being expensed for the invoice is \$3000 or greater, the invoice will be automatically routed to the second approver.

Invoice: ABC event catering order

Status: Pending Cost Object Approval

Actions: [Send Back](#) [Approve](#)

Vendor Information: Sodesho Inc & Affiliates, 1951 East West Road, HONOLULU, HI 96822

Invoice Details: Policy: **Test UHF Invoice Policy, Invoice Name: ABC event catering order, Invoice Number: XYZ123, Invoice Date: 01/01/2020

Invoice Image: INVOICE, DATE: 1/1/2020, INVOICE NO: XYZ123, Sodesho Inc & Affiliates, 1951 East West Road, Honolulu, HI 96822

- To send back an invoice for additional information or correction, double-click the appropriate invoice, and then click **Send Back**.

Invoice: ABC event catering order

Status: Pending Cost Object Approval

Actions: [Send Back](#) [Approve](#)

Vendor Information: Sodesho Inc & Affiliates, 1951 East West Road, HONOLULU, HI 96822

Invoice Details: Policy: **Test UHF Invoice Policy, Invoice Name: ABC event catering order, Invoice Number: XYZ123, Invoice Date: 01/01/2020

Invoice Image: INVOICE, DATE: 1/1/2020, INVOICE NO: XYZ123, Sodesho Inc & Affiliates, 1951 East West Road, Honolulu, HI 96822

Enter your comment detailing the additional information or correction necessary. Click **OK** to submit the comment to the requestor.

Send Back Invoice

Add a comment to explain why you are returning the invoice. Then click OK to return the invoice to the employee.

Comment:

Please upload the missing supporting documentation.

Comment History

Date	Entered By	Comment Text
06/24/2020	Test, Inv1-UHF	Some additional information.

OK Cancel

Correcting an Invoice

Invoice approvers have the ability to request additional information or corrections to an invoice by using the **Send Back** feature.

When an invoice is sent back to you for further action before approvals can be gained, the invoice becomes unsubmitted again and is in status **Sent Back To Employee**.

To provide additional information or correct a Sent Back invoice

1. View invoices sent back on the **Invoice Manager** page, in the **Unsubmitted Invoices** view. The comment of the approver who **Sent Back** the invoice will be displayed under the Last Comment column. Click on the **Invoice Name** to open the invoice.

Alert	Image	Invoice Name	Vendor Name	Invoice Number	Invoice Date	Total	Last Comment	Web User Since
<input type="checkbox"/>		Test Email Notifications #1	1132 Cafe & Catering	TestMail#06/20/20	06/20/2020	\$25,000.00	Test	
<input type="checkbox"/>		ABC event catering order	Sodexo Inc & Affiliates	XV2123	01/01/2020	\$84.61	Please upload the missing supporting documentation.	

2. On the **Invoice** page, go to **Details** then **Comments** to view the comments indicating the additional information or corrections needed for approval.

Invoice: ABC event catering order

Status: Sent Back To Employee

Actions: Details, Comments

Date	Entered By	Comment Text
06/24/2020	Test, Inv1-UHF	Some additional information.

Vendor: Sodexo Inc, 1551 East West Road, HONOLULU HI 96822

Invoice Name: ABC event catering order

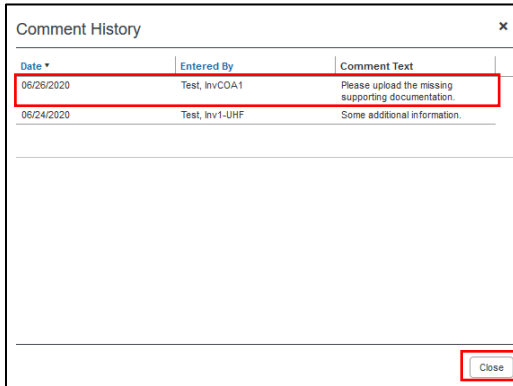
Invoice Number: XV2123

Invoice Date: 01/01/2020

Business Purpose: Food order for ABC event held on 11/1/2020

INVOICE

- Review the comments entered by the approver who **Sent Back** the invoice in the **Comment History**. Click **Close** when done.



- Once the necessary additional information or corrections to the invoice are completed, submit the invoice again for processing by clicking **Submit Invoice**.



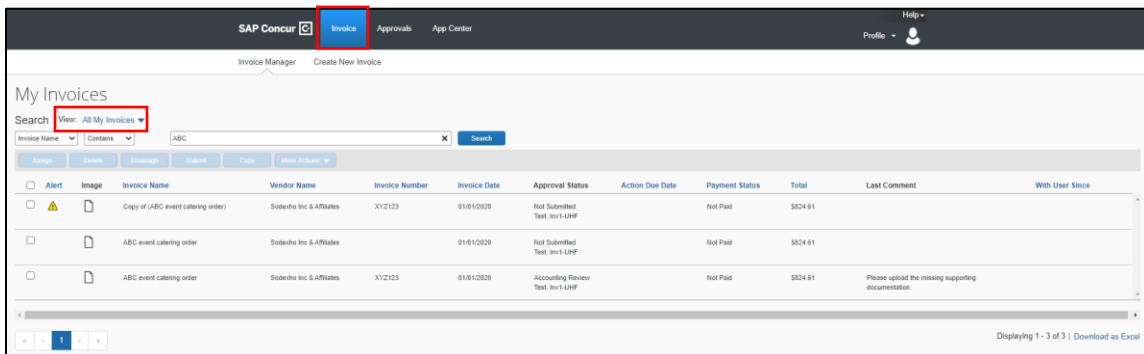
Viewing Invoice Status

Invoice owners can view the **Approval Status** and **Payment Status** of invoices that they have submitted.

To view the status of an invoice

- On the **SAP Concur** home page, from the menu bar, click **Invoice**.

From the **Invoice Manager** submenu, change the **View** to **All My Invoices**.



- A list of all invoices that belong to the invoice owner will be displayed. The **Approval Status** indicates the current workflow step of an invoice.

Invoice Name	Vendor Name	Invoice Number	Invoice Date	Approval Status	Action Due Date	Payment Status	Total	Last Comment	With User Since
Copy of (ABC event catering order)	Soderho Inc & Affiliates	XY2123	01/01/2020	Not Submitted Test Inv-LUHF		Not Paid	\$824.61		
ABC event catering order	Soderho Inc & Affiliates		01/01/2020	Not Submitted Test Inv-LUHF		Not Paid	\$824.61		
ABC event catering order	Soderho Inc & Affiliates	XY2123	01/01/2020	Accounting Review Test Inv-LUHF		Not Paid	\$824.61	Please upload the missing supporting documentation.	

Approval Status	Description
Not Submitted	The invoice has not been submitted.
Pending Approval / Pending Cost Object Approval	The invoice is awaiting one or more approvals. The name of the current approver will be listed under the approval status.
Vendor Approval	The vendor on the invoice is awaiting review by the UH Foundation Fiscal department.
Accounting Review	The invoice is awaiting approval by the UH Foundation Fiscal department.
Sent Back To Employee	The invoice has been sent back to the invoice owner.
Approved	The invoice has been fully approved.

3. The **Payment Status** of all invoices is also listed.

Invoice Name	Vendor Name	Invoice Number	Invoice Date	Approval Status	Action Due Date	Payment Status	Total	Last Comment	With User Since
Copy of (ABC event catering order)	Soderho Inc & Affiliates	XY2123	01/01/2020	Not Submitted Test Inv-LUHF		Not Paid	\$824.61		
ABC event catering order	Soderho Inc & Affiliates		01/01/2020	Not Submitted Test Inv-LUHF		Not Paid	\$824.61		
ABC event catering order	Soderho Inc & Affiliates	XY2123	01/01/2020	Accounting Review Test Inv-LUHF		Not Paid	\$824.61	Please upload the missing supporting documentation.	

Payment Status	Description
Not Paid / Processed by UHF	The invoice has not been paid.
Pending Payment	A payment demand has been generated and payment will be issued shortly.
Paid	Payment has been issued. NOTE: The pay cycle time is 4 days for ACH in the US and 3-5 days for checks.
Voided	The payment (check or ACH payment) has been voided.

Viewing Approved Invoices

Invoice approvers can view invoices that they have previously approved.

To view previously-approved invoices

1. On the **SAP Concur** home page, from the menu bar, click **Approvals** and then click on **Invoices**.

From the **Invoices** submenu, change the **View** to **All Invoices**.

Invoice Number	Vendor Name	Has Alloca...	Total	Submit Date	Invoice Date	Action Due Date	Approval Status	Last Comment
Test Altair 6/27/2...	Sodexo Inc & A...	Yes	\$10.00	07/03/2020	06/27/2020		Pending Cost Object Approval	
1256	AGUO Interstate...	No	\$238.00	07/07/2020	07/01/2020		Pending Cost Object Approval	ice Prepaid
12345	AGUO Interstate...	Yes	\$100.00	07/08/2020	07/01/2020		Pending Cost Object Approval	Interstate Test
07022020	Koo, Christine K	No	\$100.00	07/02/2020	07/02/2020		Pending Cost Object Approval	Christine reimb

NOTE: Invoices that have been sent back to the invoice owner will not be displayed.

Recalling a Submitted Invoice

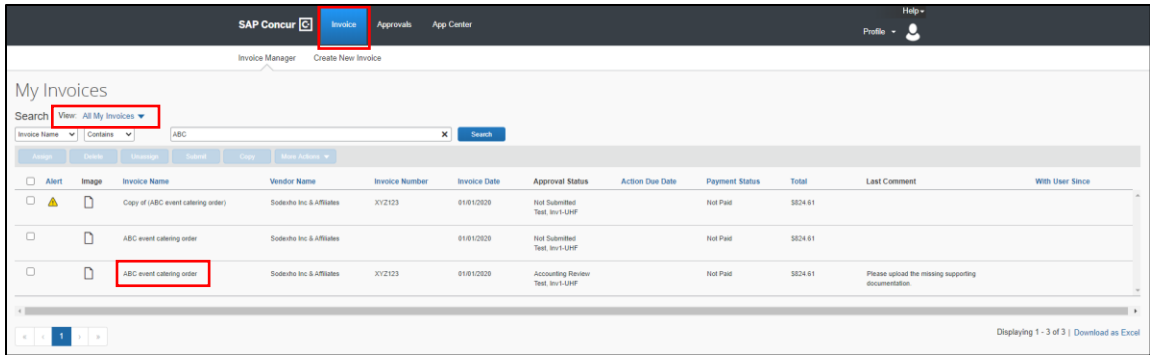
If at any time after you **Submit** an invoice you need to stop approvals or stop payment, for example, if you notice something needs to be corrected, you can **Recall** the invoice.

Invoices can be recalled up until they have an Approval Status of **Approved**, meaning that the payment process for that invoice is already underway.

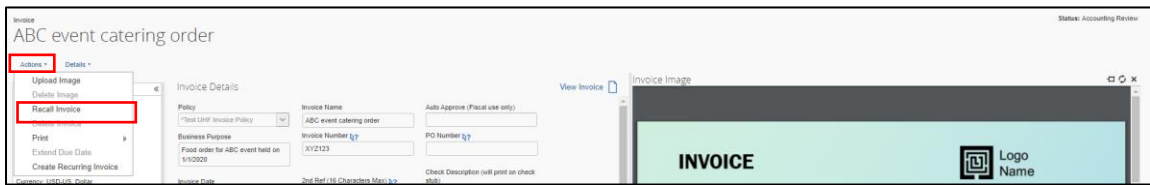
To recall a submitted invoice

2. On the **SAP Concur** home page, from the menu bar, click **Invoice**.

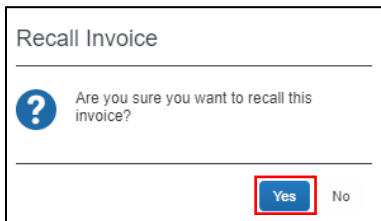
From the **Invoice Manager** submenu, change the **View** to **All My Invoices** and locate the invoice you want to recall.



3. Click on the **Invoice Name** of the invoice you want to recall to open it.
4. On the Invoice page, go to Actions and click **Recall**.



5. Click **Yes** to confirm that you would like to recall the invoice.



6. The invoice will be placed back into the **Not Submitted** status.
7. Make any necessary corrections and resubmit the invoice.

Requesting a New Vendor

If the vendor for your payment request is not located within the system, you can submit a new vendor request.

To request a new vendor

1. On the **Invoice** tab, click **Create New Invoice**.
2. On the **Create New Invoice** page, click **Request New Vendor**.

SAP Concur Invoice Approvals App Center

Invoice Manager Create New Invoice

Create New Invoice

Choose Policy and select a Vendor from the vendor list below.

Policy: *Test UHF Invoice Policy

Vendor List

Vendor Name	Vendor Code	Account Number	Care of	Vendor Address Code	Remit Address 1	Remit Address 2	Remit Address 3 (Use...)	Remit Address 4 (Use...)	City	State/Province	Postal/Zip Code	Country
1332 Cafe & Catering	V051778			RI	751 1st St, 5th Floor				HONOLULU	HI	96813	UNITED STATES
Amprint	V022837			PI	25303 Network Pl				CHICAGO	IL	60673-1253	UNITED STATES
808 Travel Inc	V037239			HI	429 Waikele Road Sui.				HONOLULU	HI	96811	UNITED STATES

- Under **General Vendor Information**, complete the required fields (indicated with a red bar), and then click **OK**.

Request New Vendor

Actions ▾

General Vendor Information

Vendor Name

Vendor Type

Care of

Approved Vendor

Remit Address 1

Remit Address 2

Remit Address 3 (does not print on Invoice Pay checks)

Remit Address 4 (does not print on Invoice Pay checks)

City

State/Province

Postal/Zip Code

Country

Currency

Contact First Name

Contact Last Name

Contact Email

Telephone Number

OK Cancel Apply

The Foundation requires an **IRS W-9** form for all new vendors and individuals who are non-UH employees when payment is requested. This is to comply with federal reporting guidelines.

Please upload documents to our secure file sharing site:

<https://www.uhfoundation.org/payment-request-documents-upload>

Enrolling a Vendor to Receive ACH Payments

Vendors may complete the ACH authorization form to set up ACH payments. University of Hawai'i faculty, staff, and students with domestic (U.S.) bank accounts are also eligible to enroll with ACH.

Complete the [Authorization Agreement for Direct Deposits Via ACH \(ACH Credits\) form](#) to request payment of expense reimbursements (for UH Foundation and UH/RCUH employees) and vendor invoices by ACH method. **Please allow approximately one week for the account to be setup and activated before the first ACH payment request is submitted.**

Assigning a Delegate

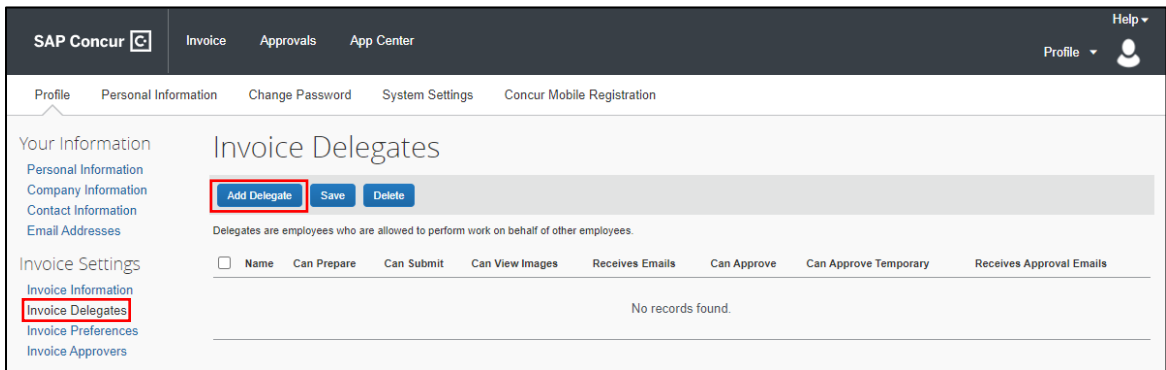
You can add **Invoice Delegates** to act on their behalf, defining specific tasks that the delegate can complete.

To assign a delegate:

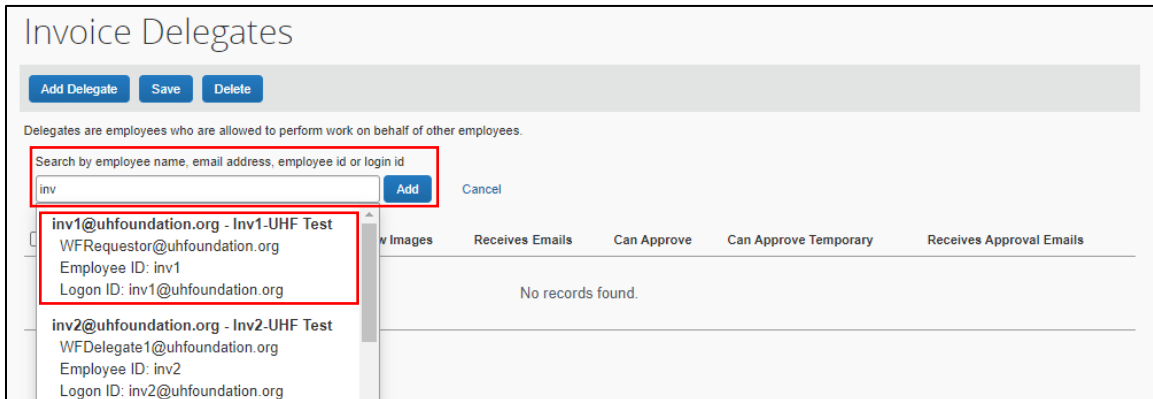
1. In the top navigation bar, click on **Profile** and select **Profile Settings**.



2. On the Invoice Delegates page, click on **Add Delegate**.



3. A search box will appear. Search for the employee to assign as a delegate using their name or email address. Click on the appropriate employee and then **Add**.



4. Select the tasks the delegate can complete on your behalf.

Invoice Delegates

Add Delegate Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can Submit	Can View Images	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	Test, Inv1-UHF WFRrequestor@uhfoundation.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 06/01/2020 06/30/2020	<input checked="" type="checkbox"/>

Delegate Option	Description
Can Prepare	The delegate can create invoices on your behalf.
Can Submit	The delegate can submit invoices on your behalf. NOTE: If you do not allow the delegate to submit, you receive an email notification when the delegate has completed the invoice and it is ready for submission.
Can View Receipts	The delegate can view receipt images on your behalf.
Receives Emails	The delegate receives a copy of each Invoice-related email that you receive, except for approval emails.
Can Approve	The delegate can approve invoices on your behalf, without date constraints.
Can Approve Temporary	The delegate can approve invoices on your behalf but only for the specified period. If you select this option, you must also select beginning and ending date.
Receives Approval Emails	The delegate receives a copy of each Invoice-approval-related email that you receive. NOTE: The delegate cannot approve or reject the invoice via email.

5. **Save** the **Invoice Delegate** entry.
6. To **Edit** an **Invoice Delegate** entry, edit the delegate options for the entry you wish to edit. Click **Save**.

Invoice Delegates

Add Delegate Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can Submit	Can View Images	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	Test, Inv1-UHF WFRrequestor@uhfoundation.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 06/01/2020 06/30/2020	<input checked="" type="checkbox"/>

7. To **Delete** an **Invoice Delegate** entry, check the box of the entry you wish to delete. Click **Delete**.

Invoice Delegates								
<input type="button" value="Add Delegate"/> <input type="button" value="Save"/> <input type="button" value="Delete"/>								
Delegates are employees who are allowed to perform work on behalf of other employees.								
<input type="checkbox"/>	Name	Can Prepare	Can Submit	Can View Images	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input checked="" type="checkbox"/>	Test, Inv1-UHF WFRrequestor@uhfoundation.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 06/01/2020 <input type="checkbox"/> 06/30/2020	<input checked="" type="checkbox"/>

Acting as a Delegate

To perform delegate duties:

1. In the top navigation bar, click on **Profile** and select the user to perform duties on behalf of in the **Acting as other user** section. This section only appears if you have been assigned delegate options by another user. Clicking into the **Search by name or ID** field will display all the users who have add you as a delegate.

The screenshot shows the SAP Concur interface. In the top right corner, the 'Profile' dropdown menu is open, showing the user 'Inv1-UHF Test'. Below this, the 'Acting as other user' section is highlighted with a red box. It contains a search field labeled 'Search by name or ID' with a magnifying glass icon. Below the search field, a dropdown list shows the selected user: 'Test, InvCOA1' with details: 'WFAA1@uhfoundation.org (Email)', 'Employee ID: invcoa1', and 'Logon ID: invcoa1@uhfoundation.org'.

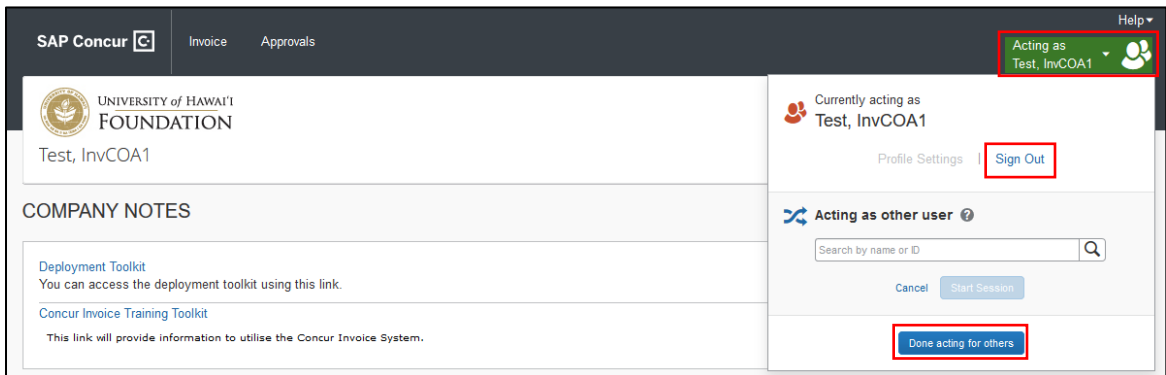
2. Select the user by clicking on the user information row. Click on **Start Session**.

The screenshot shows the same SAP Concur interface as the previous one. The 'Acting as other user' section is still highlighted with a red box. The search field now contains the text 'Test, InvCOA1'. Below the search field, there are two buttons: 'Cancel' and 'Start Session', with 'Start Session' highlighted by a red box.

3. **Acting as user name** will appear in the navigation bar. You will now be able to complete tasks delegated to you on behalf of the user.



4. When are done acting on behalf of the user, click on **Acting as *user name*** in the navigation bar and **Sign Out** or click **Done acting for others**.



Email Notifications

SAP Concur sends out several system-generated email notifications. These email notifications will come from email addresses **AutoNotifications@concur solutions.com** or **EmailService@concur solutions.com**.

Email Description	Email Recipient
Inform invoice owner that an invoice has been assigned to them	Invoice Owner
Notification that the invoice was returned (sent back) for additional information or corrections	Invoice Submitter
Notification that the invoice has reached the UH Foundation Fiscal department for processing	Invoice Submitter
Notification that the invoice has been paid	Invoice Submitter
Notification that the invoice has been voided	Invoice Submitter
Notification to an approver that an invoice has been sent to them for approval	Invoice Approver

Invoice Payment Turnaround Time

The pay cycle time is 4 business days for ACH in the US and 3-5 business days for checks.

Checks are issued and sent every weekday via the US Postal Service. Delivery times may vary due to holidays.

Questions?

If you have any questions, email [**ConcurSupport@uhfoundation.org**](mailto:ConcurSupport@uhfoundation.org).