UNIVERSITY of HAWAI'I
FOUNDATION

SAP Concur Invoice User Guide – UH Employees

Last Modified 11/15/2023

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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.

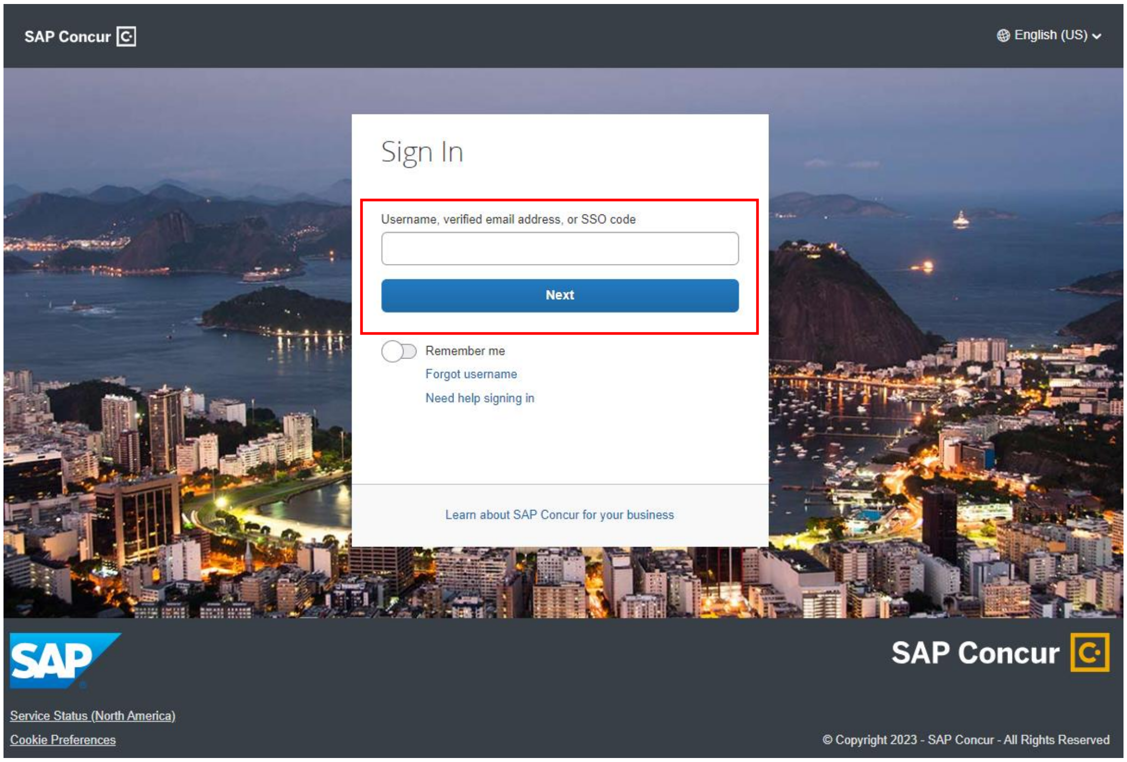
For those that are not listed as an account administrator or support staff but needs to have access to Concur, please submit a Concur Invoice Access Request at https://www.uhfoundation.org/resources/forms/concur.

Signing Into Concur Invoice

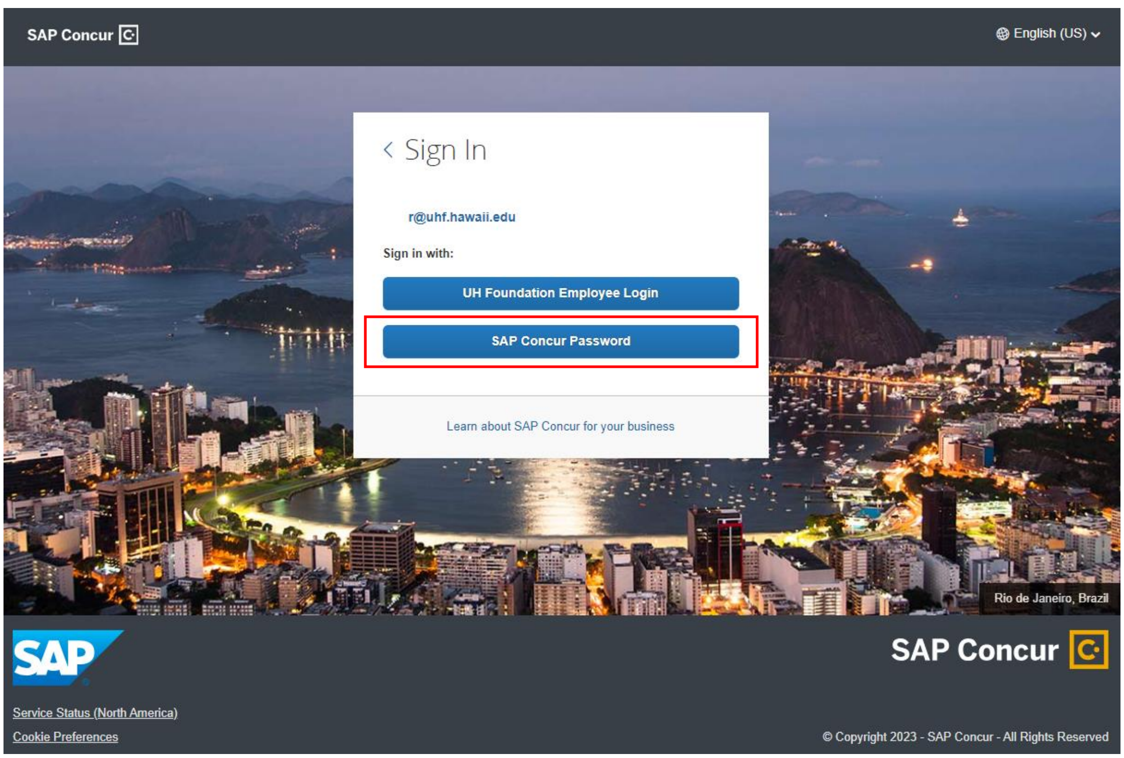
1. To sign in to SAP Concur, go to https://www.concursolutions.com/.

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**..

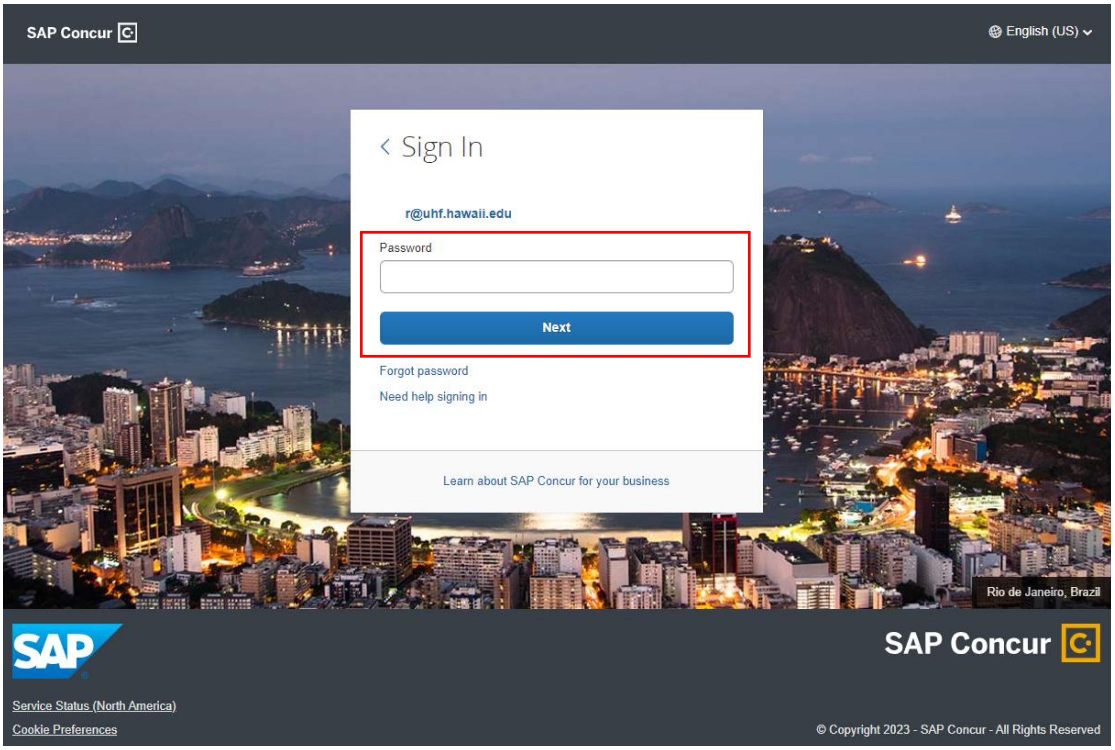
IMPORTANT: If you do not include "uhf" in your Concur Username, you will not be signed into UH Foundation's Concur site and you may be signed into UH's Concur site instead.



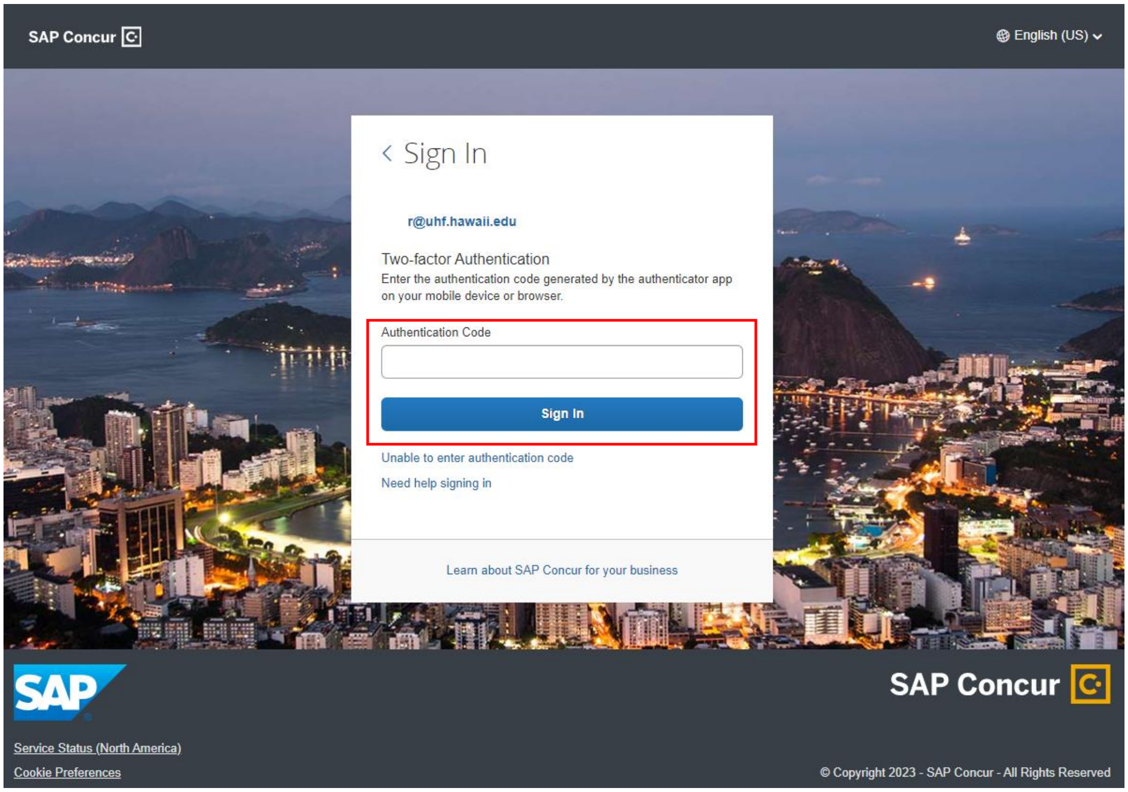
3. On the next page, select the **Sign in with SAP Concur Password** option.



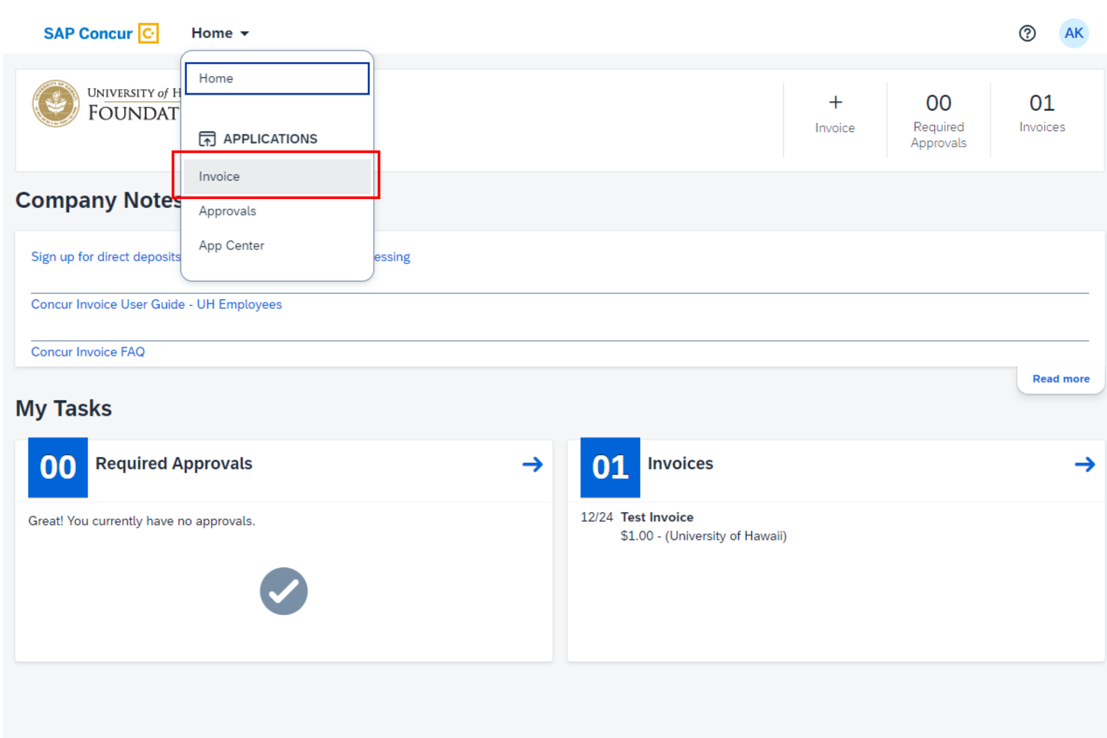
4. Enter your SAP Concur Password and click **Next**. *Note: When signing into Concur for the first time, you will need to select “Forgot password” to reset your password.*



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)

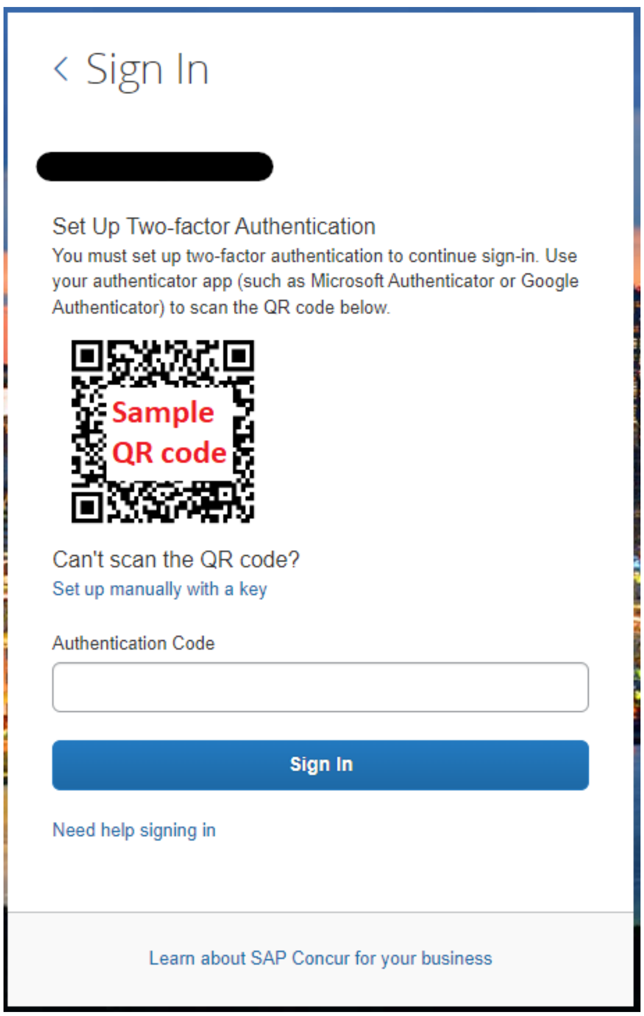
When signing in for the first time using your SAP Concur Password, you will need to set up 2FA, which involves downloading an authentication app on either your mobile device or web browser. **IMPORTANT**: Please note that this additional 2FA setup is required by SAP and is separate from UH multi-factor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



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.

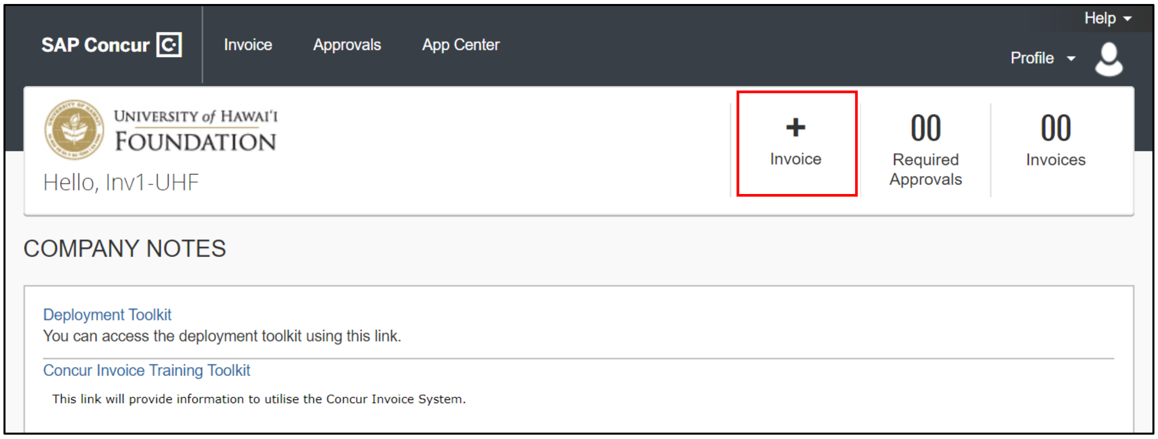
4. **Attach** an image of the invoice.

5. **Submit** the invoice.

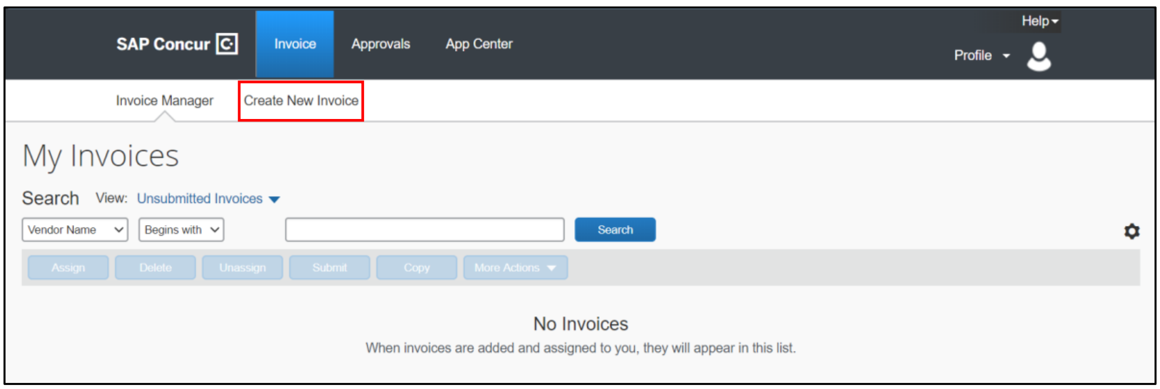
Step 1: Creating an invoice

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

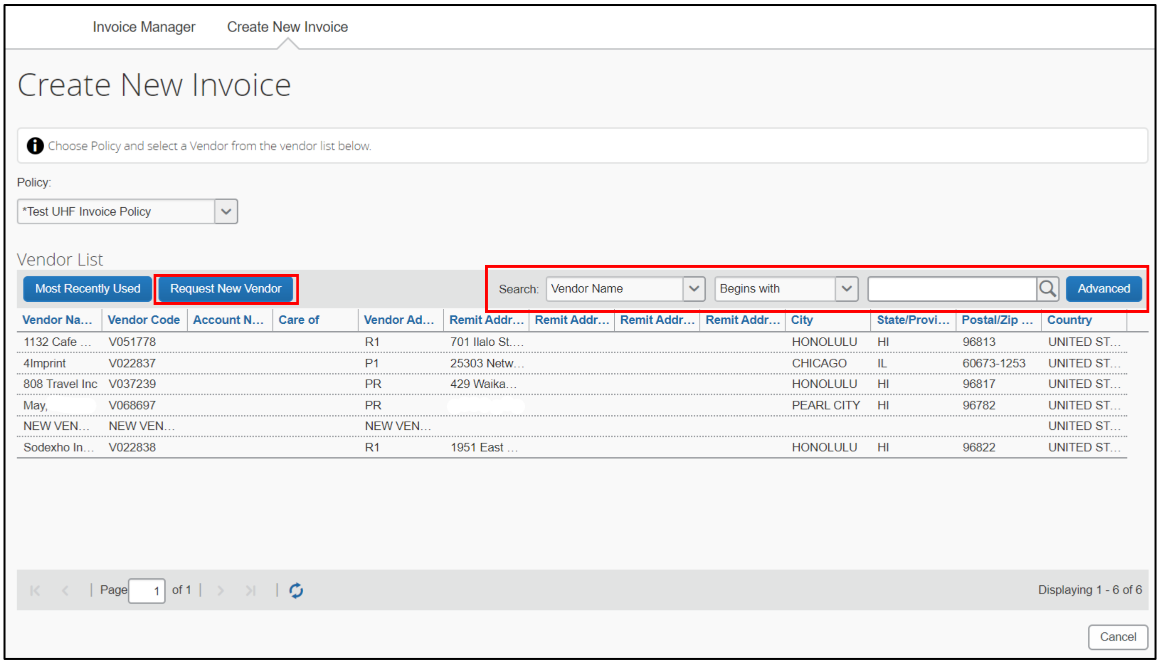
On the **SAP Concur Home page** click **+ Invoice**



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



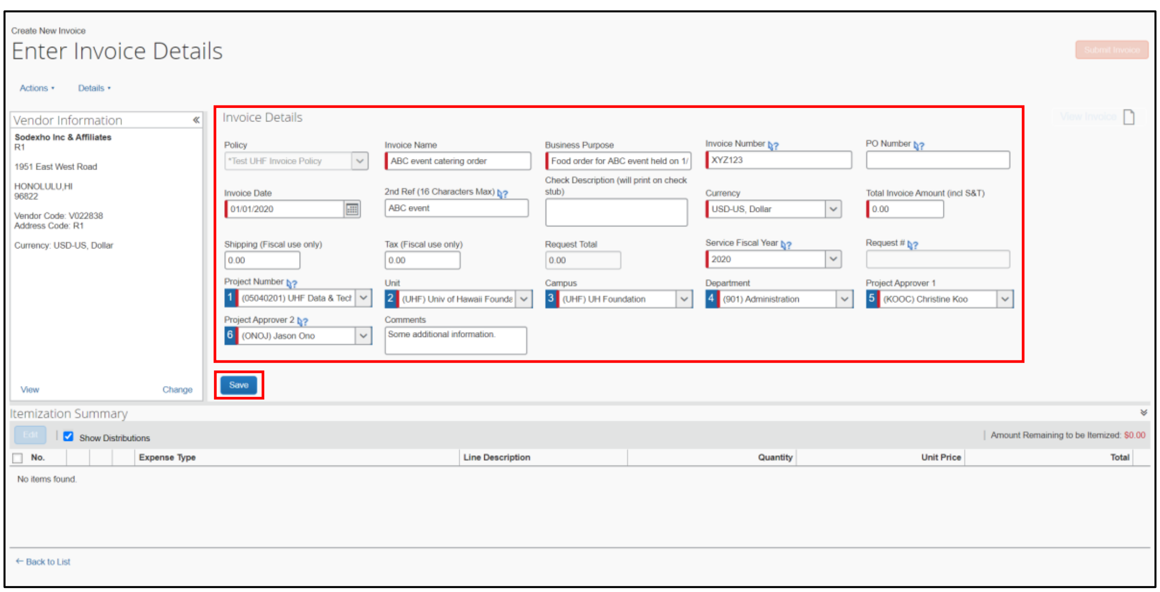
2. On the **Create New Invoice** page, use the **Search** fields to find and select the appropriate vendor or select it from the entire **Vendor List** by clicking the **Search** icon . Changing the search operator from **Begins with** to **Contains** will expand the search.



3. 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.

4. 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**.



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

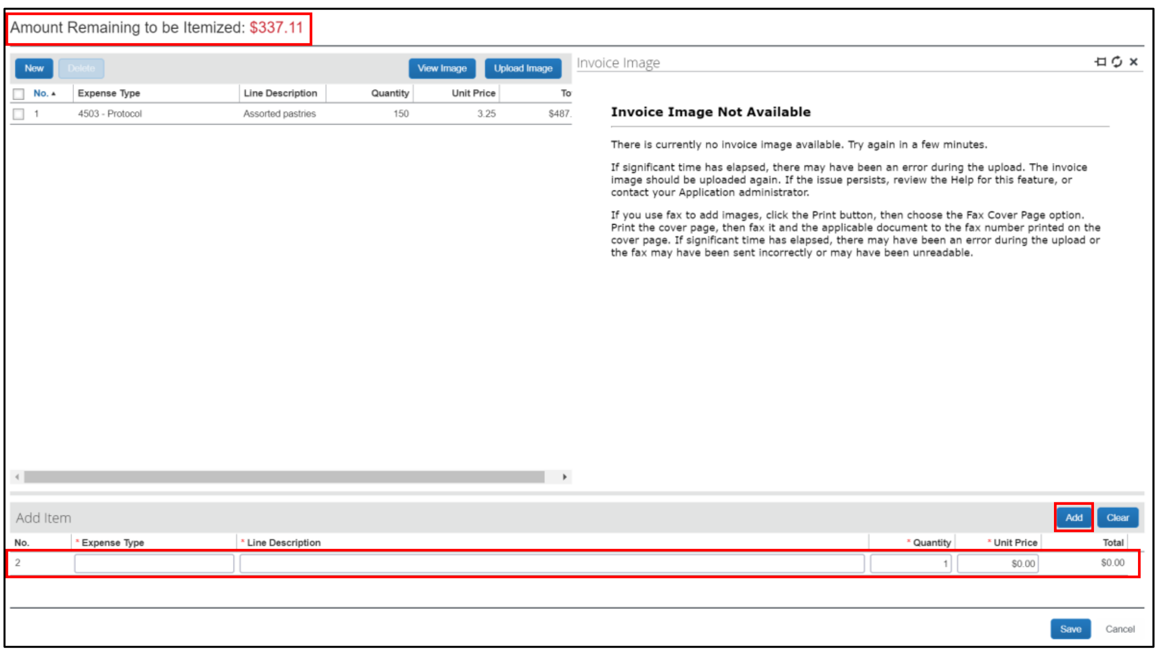
You must itemize all invoices to show the goods or services received.

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.



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

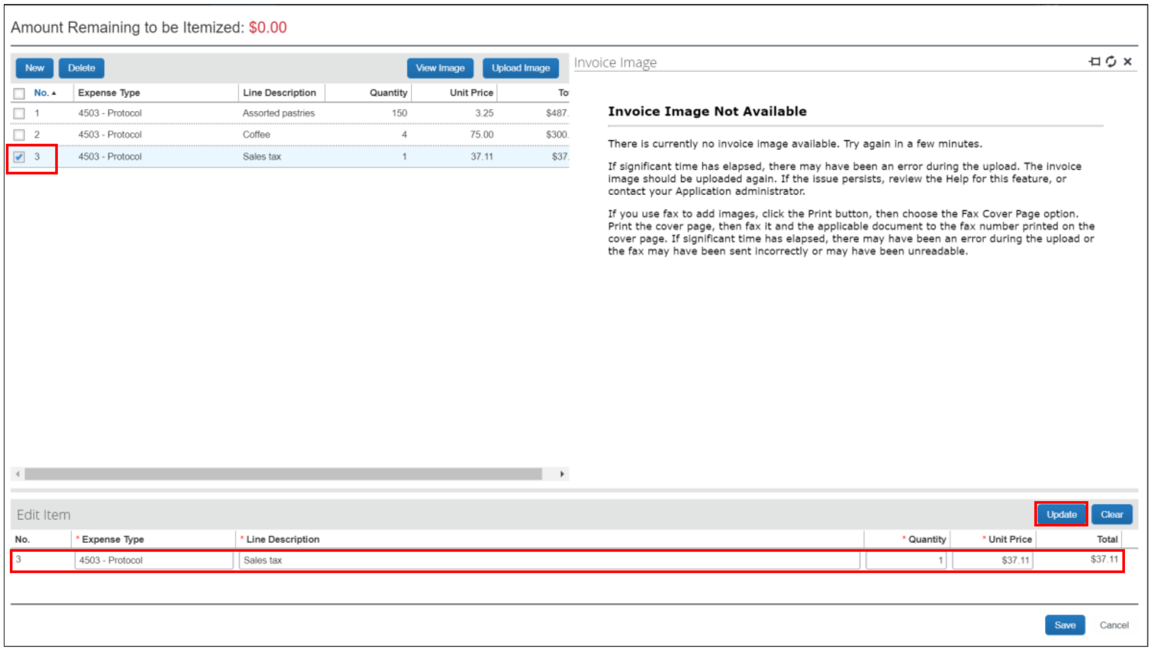
Line Description: Expense line item description. Required.

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).

5. 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**.



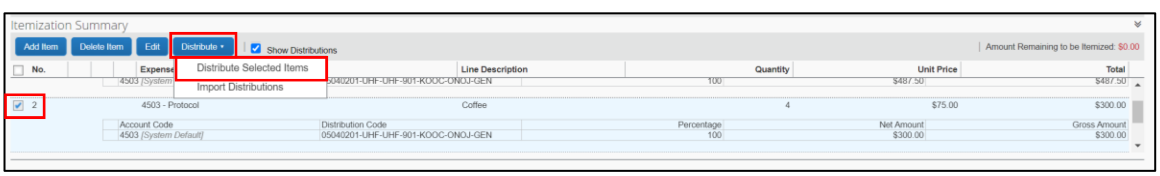
6. Click **Save**.

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).

1. 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.

2. Click **Distribute**, and then click **Distribute Selected Items**.



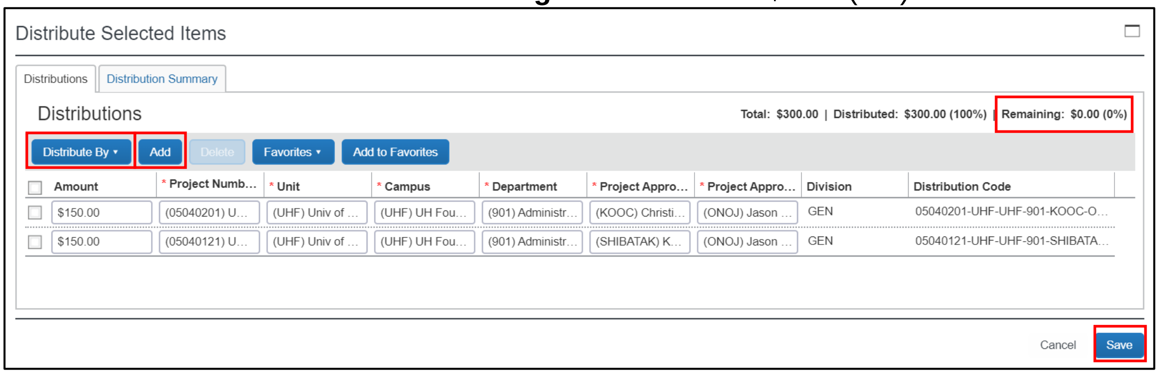
3. On the **Distribute Selected Items** page, click **Distribute By**, and then select **Percentage** or **Amount** as the distribution type. Note that working with **Amounts** may be easier to work with over **Percentages**.

4. 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%).



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

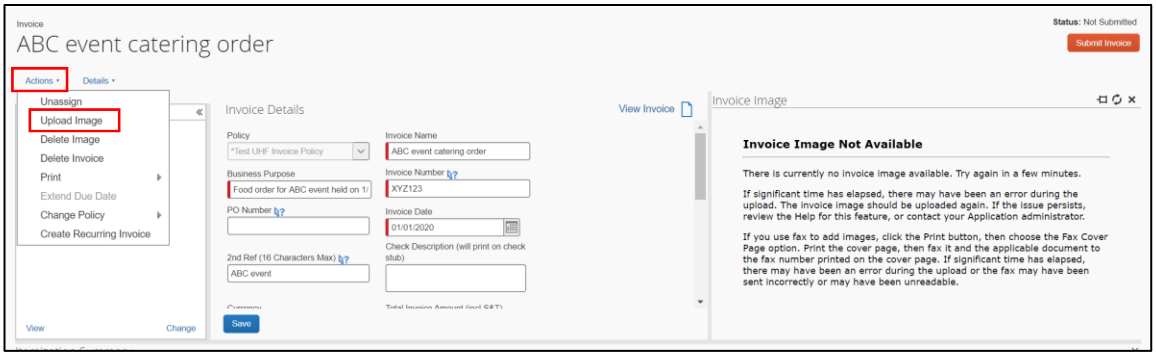
Per the UH Foundation Account Administration Policy, it is required to upload a digital copy of the invoice, receipt(s) and any necessary supporting documentation. When uploading a copy of a paper receipt, please write "Submitted to UHF on <date>" on the paper receipt before scanning.

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

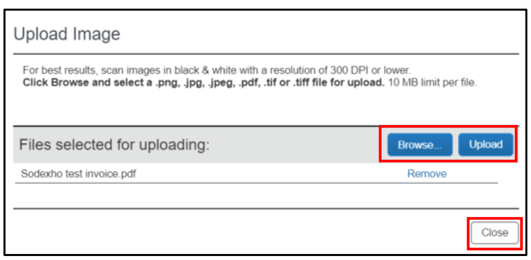
If your payment request requires you to submit required or supporting documents that contain sensitive information (e.g. social security numbers, etc.), please instead upload the documents to our secure file sharing site using the appropriate link below:

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

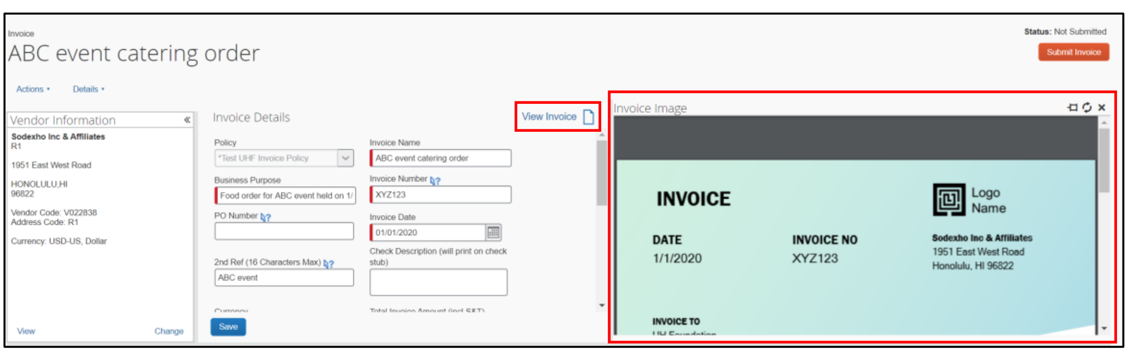
1. On the **Invoice** page, go to **Actions** then select **Upload Image**.



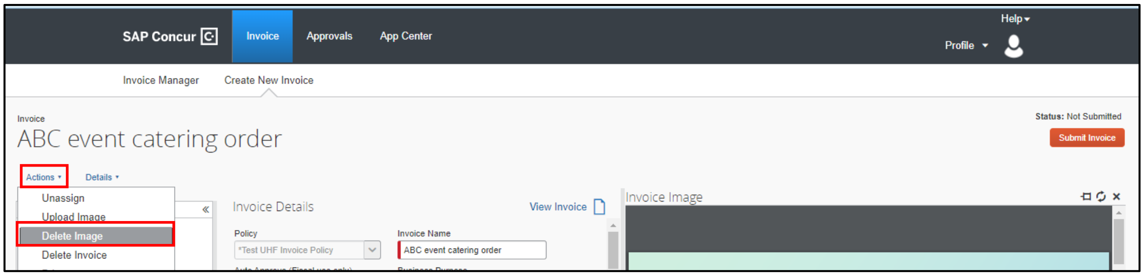
2. Select the invoice, receipt(s) and any necessary supporting documentation to upload by clicking **Browse**. Multiple documents can be uploaded at once. Once all documentation to upload has been selected, click **Upload**. Once all documents have been uploaded, click **Close.** Images can be in .png,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



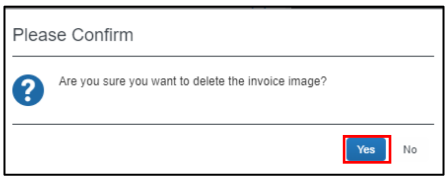
3. The upload documentation will appear in the **Invoice Image** pane. If you do not see the document(s), click on **View Invoice** in the **Invoice Details** section.



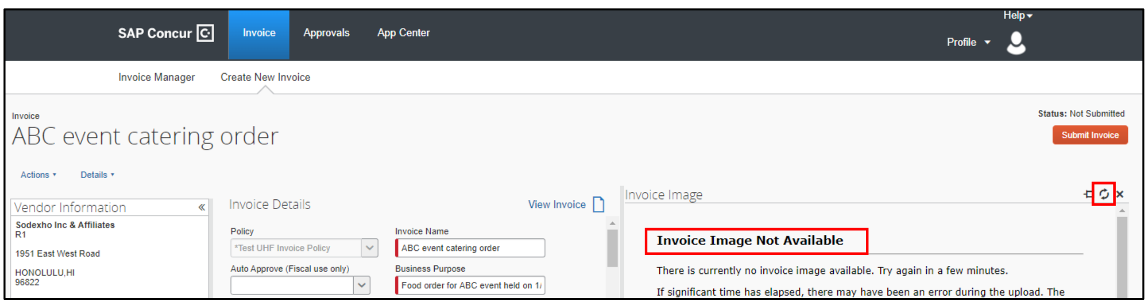
If the wrong invoice image is accidently uploaded, you can delete the uploaded invoice image by going to **Actions** then **Delete Image**.



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.

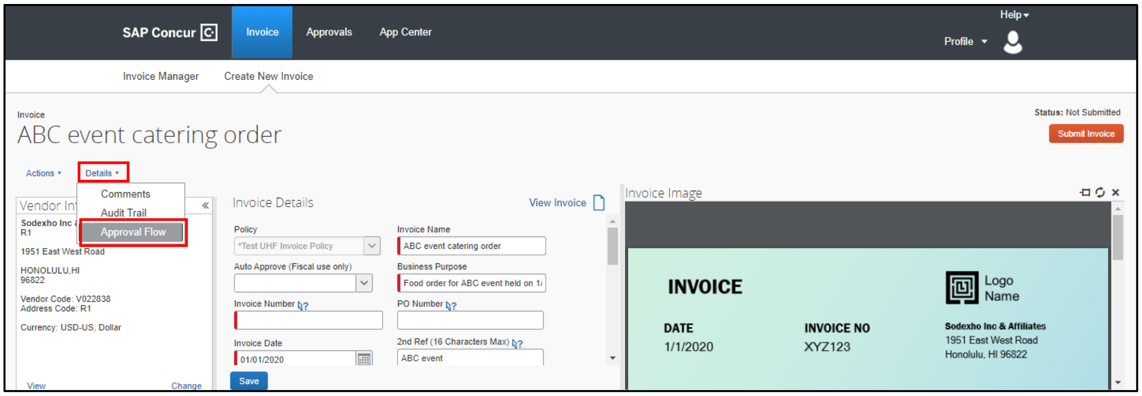


Step 5: Adding Additional Approvers

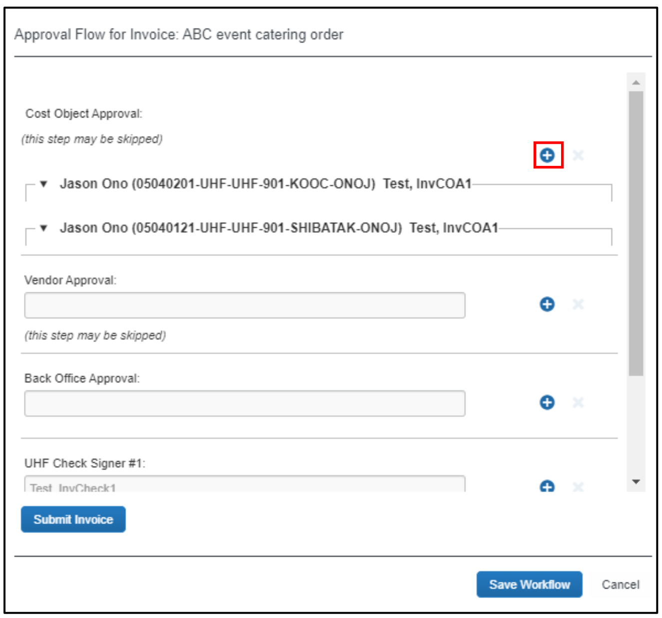
If your business process requires that approvers in addition to the selected approver 1 and 2 to review the invoice and approve, you can add additional approvers before submitting the invoice.

It a required that all additional approvers have access to Concur Invoice, see the <u>Requesting Access to Concur Invoice</u> section.

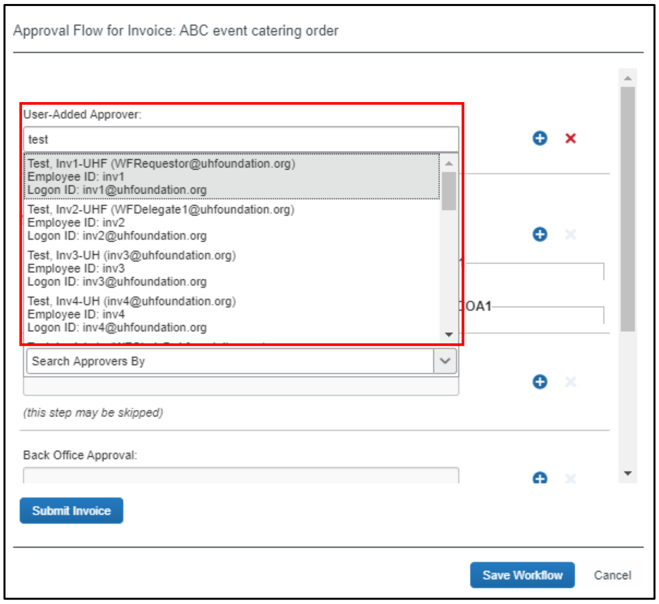
1. On the **Invoice** page, go to **Details** then click on **Approval Flow**.



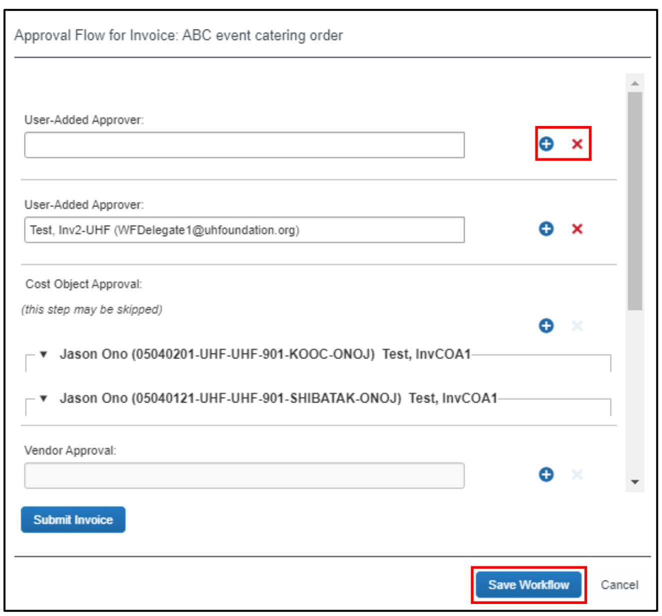
2. In the **Approval Flow** window, click on the **Add** icon in the **Cost Object Approval** section.



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**.



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**.

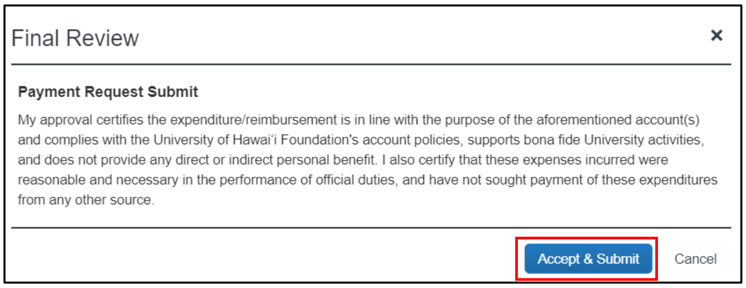


Step 6: Submitting an invoice

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.



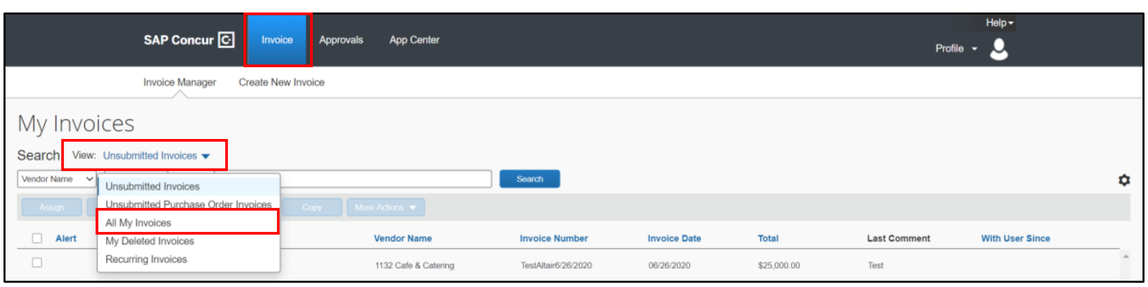
Creating a Recurring Invoice

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.

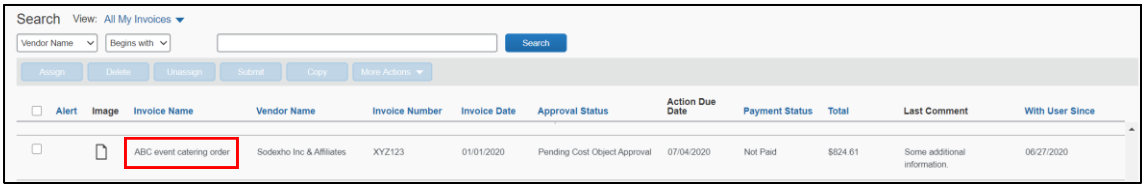
To create a recurring invoice

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

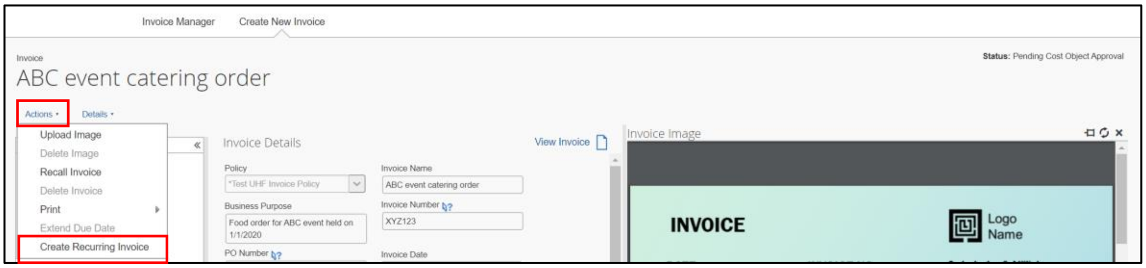
2. From the **Invoice Manager** submenu, change the **View** to **All My Invoices**.



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



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



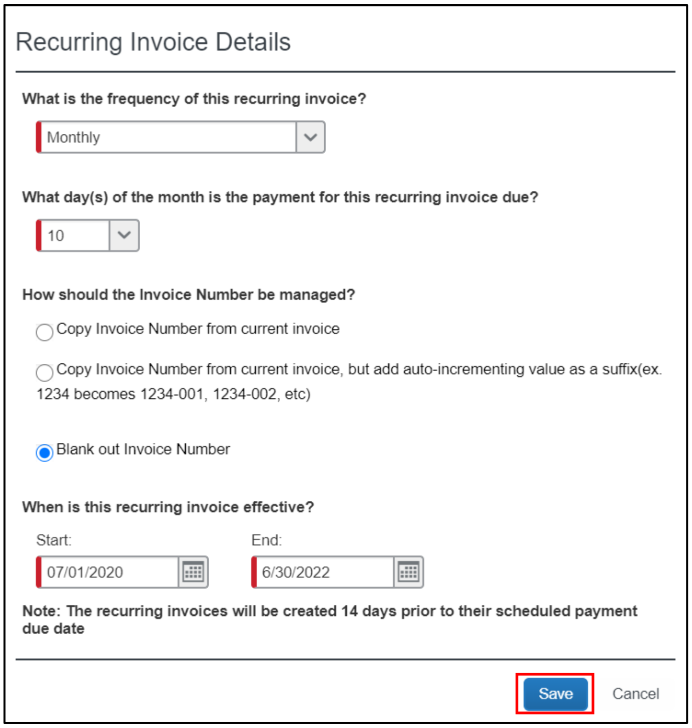
After you create a recurring invoice, you can modify the payment schedule by clicking **Edit Recurring Invoice**.

5. In the **Recurring Invoice Details** window, select the frequency for the recurring invoice from the dropdown list.

6. 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.

7. 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.

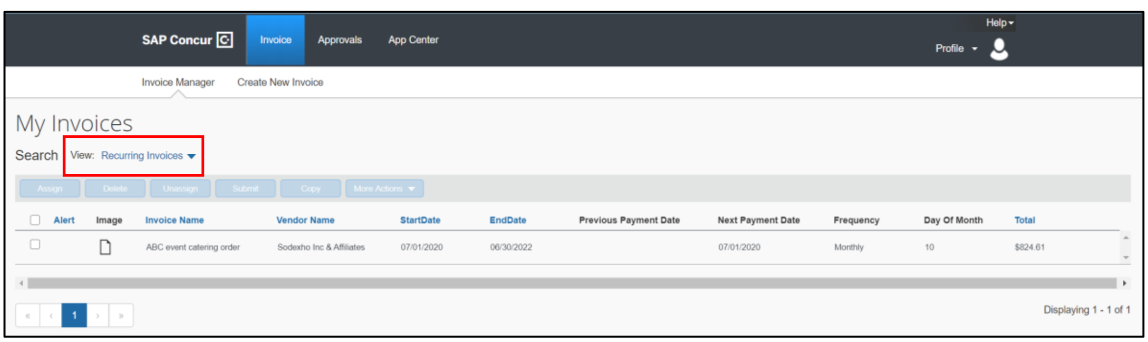
8. Select the **Start** and **End** dates for when this recurring request will be effective, and then click **Save**.



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

9. 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).



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

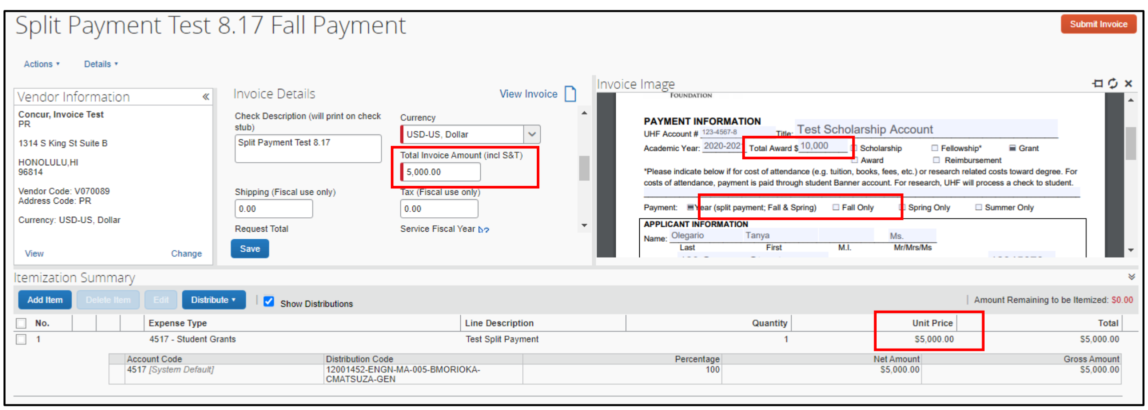
4. If submitting multiple check requests for the same student and would like separate checks issued, please make a note in the comments, otherwise one check will be issued.

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.

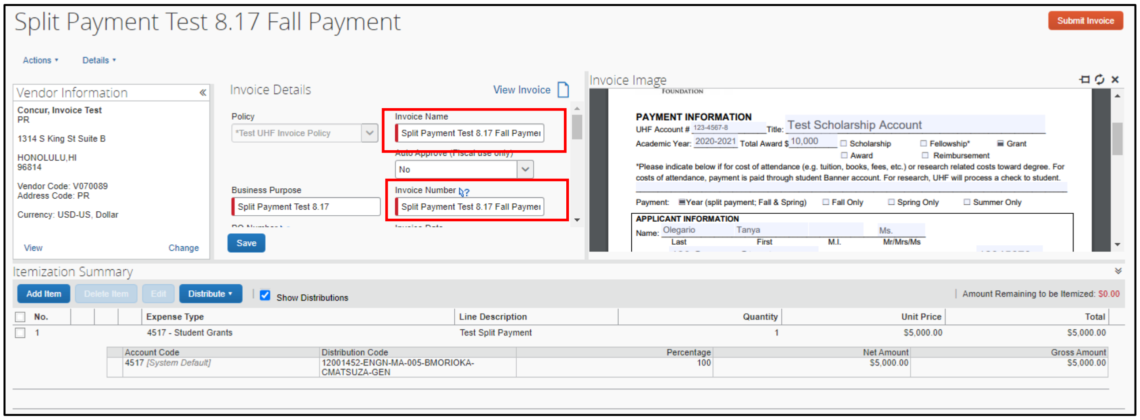
   https://www.uhfoundation.org/student-aid-documents-upload

To split payments between Fall and Spring semesters:

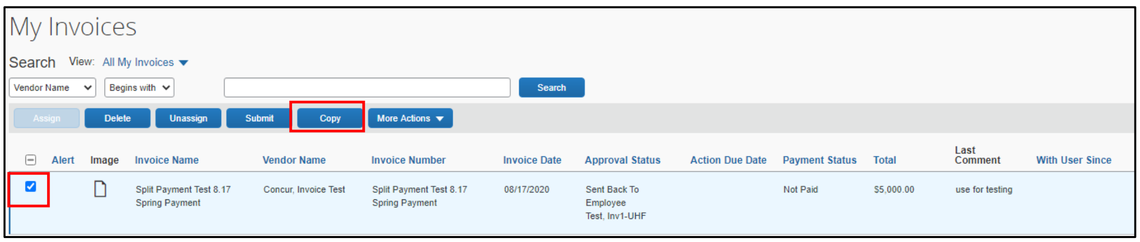
1. Fill out the UHF Payment Request Form for Student Aid form as normal for a split payment, making sure to fill in the total amount and checking the split payment option.
2. Once the invoice is inputted into Concur Invoice (see the [Creating an Invoice from an Existing Vendor](#) section), make sure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



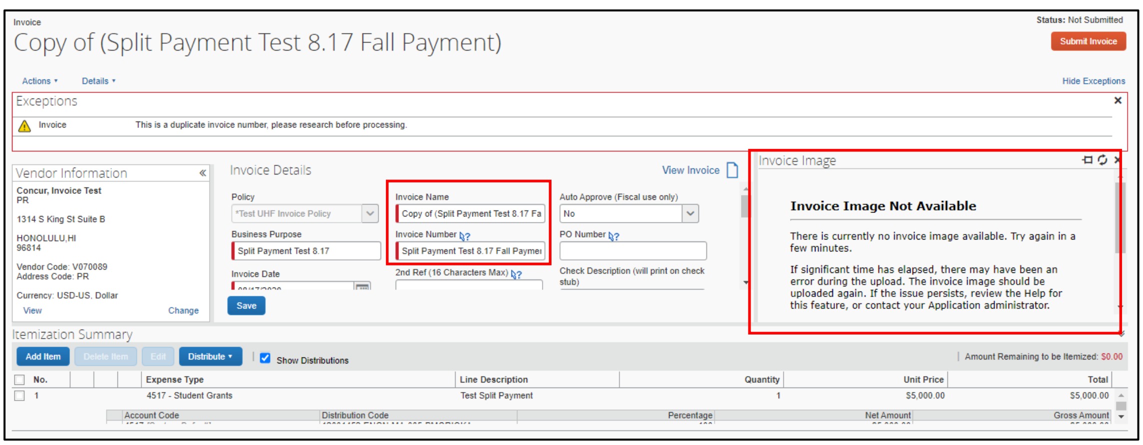
3. When inputting the **Invoice Name** and **Invoice Number**, make sure to follow the name/number by putting in "Fall Payment."

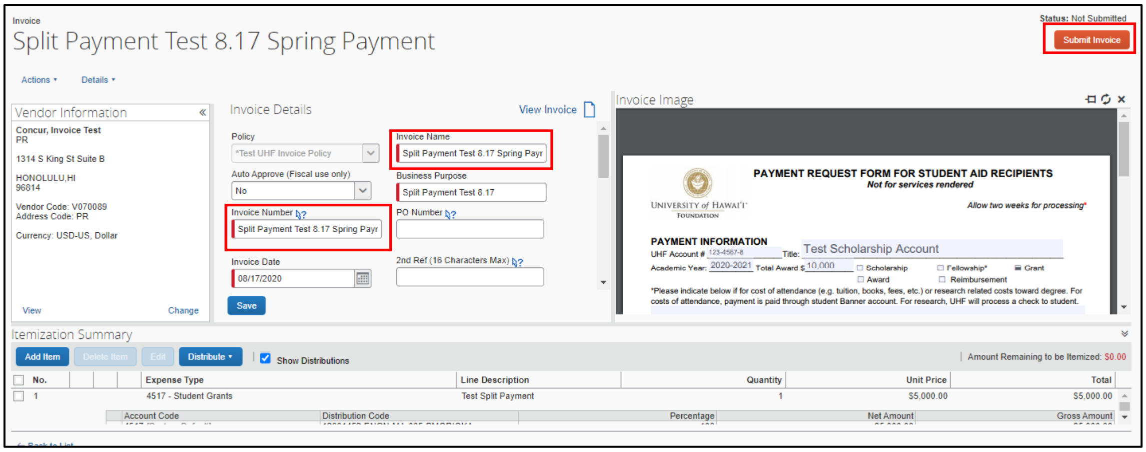


4. Next, copy the invoice. See the [Copying an Invoice](#) section.

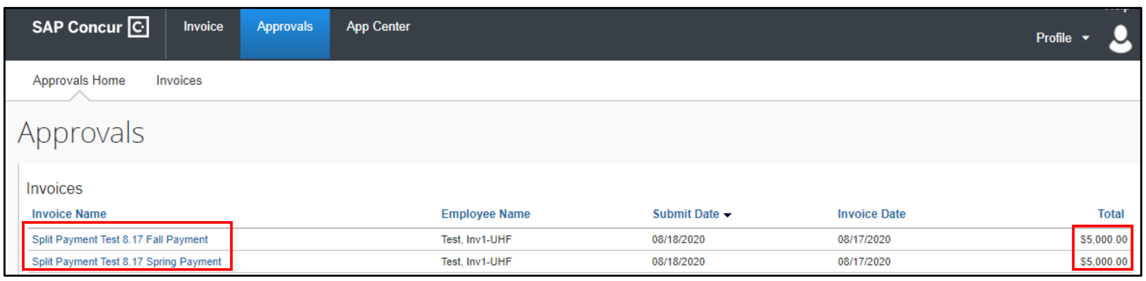


5. An error will be displayed indicating that you have the same invoice number. Change **Invoice Name** and **Invoice Number** ending from "Fall Payment" to "Spring Payment" and re-upload the backup documents, and **Submit** the invoice.





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



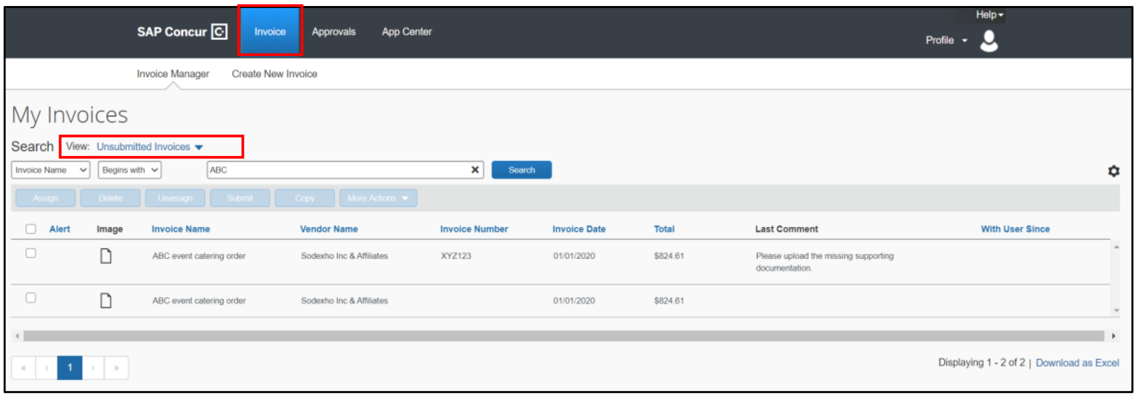
Copying an Invoice

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

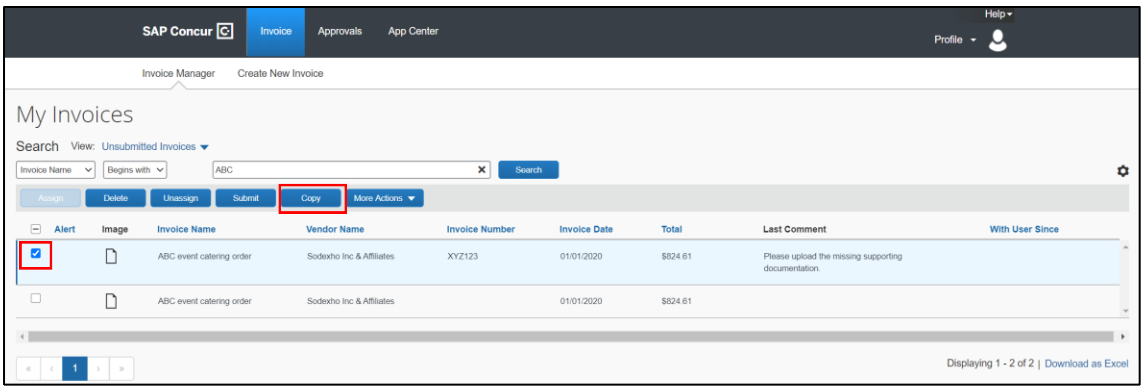
To copy an invoice

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

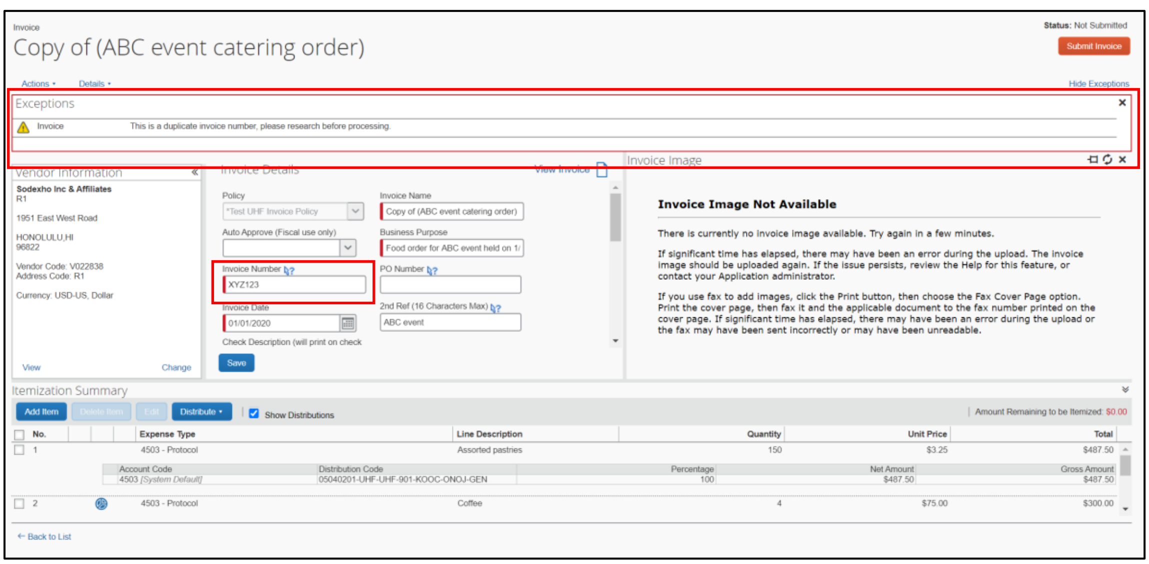
From the **Invoice Manager** submenu, change the **View** to **All My Invoices** and locate the invoice you want to copy.



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

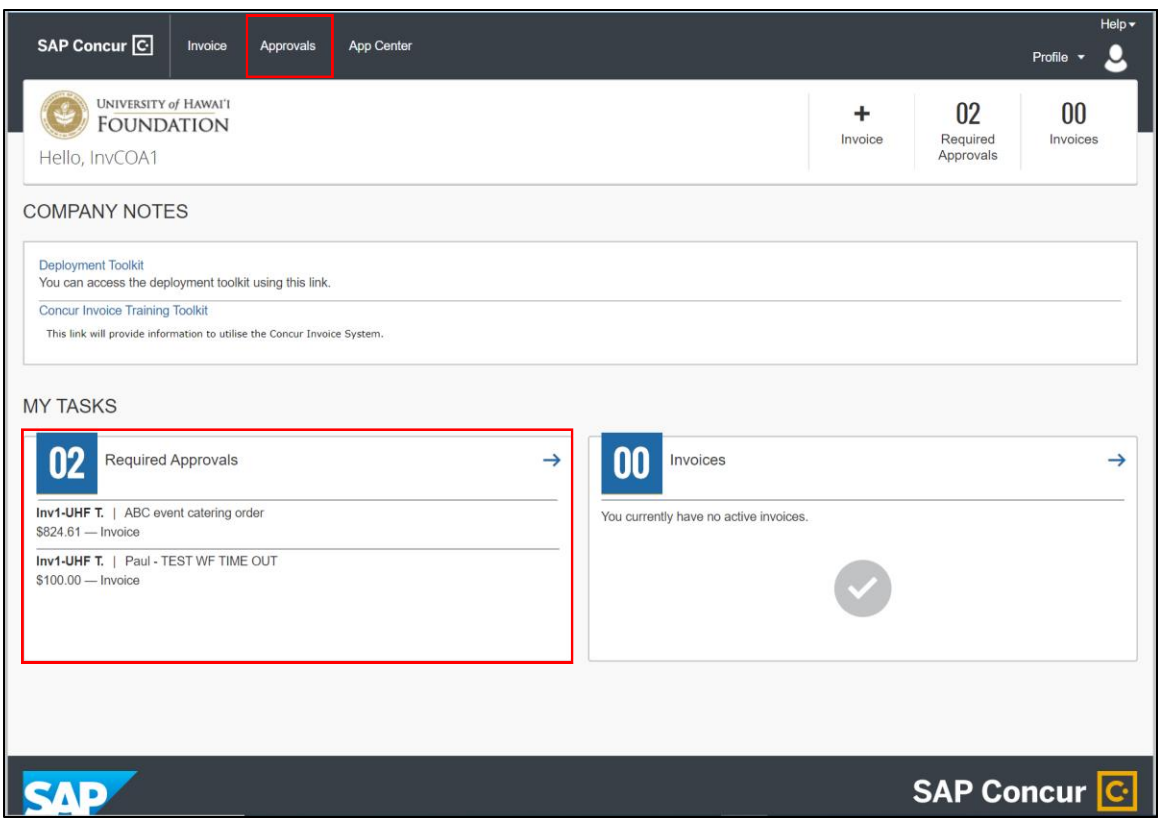
As an Invoice approver, you can review an invoice sent to you, and then:

- 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.

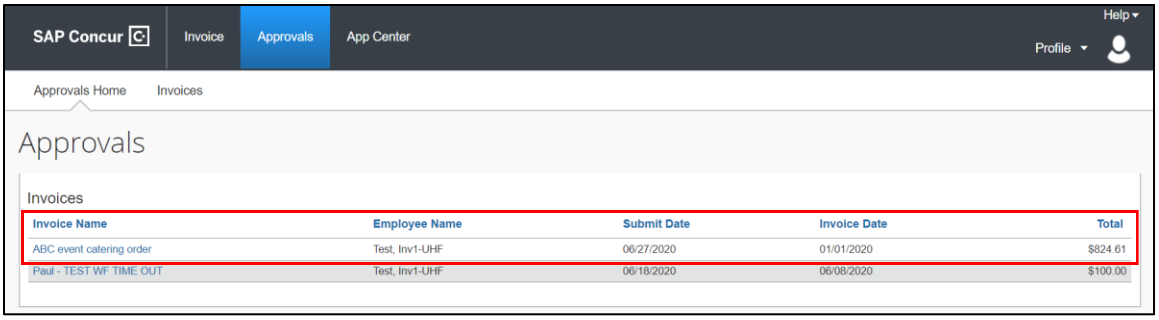
To approve an invoice

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.

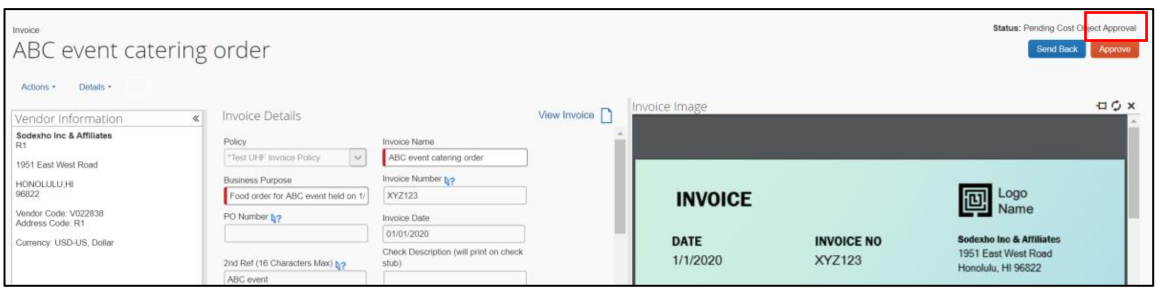
   You can also click the **Approvals** tab at the top of the home page.



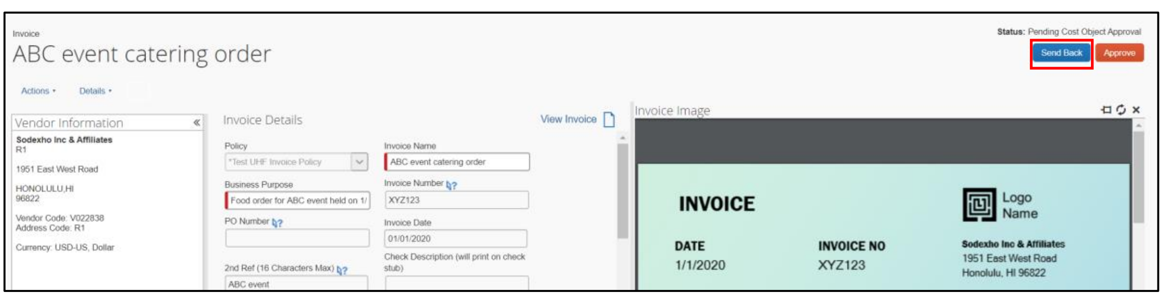
2. On the **Approvals** page, double click on the invoice row to open the invoice. After reviewing the invoice details and uploaded documentation, you can **Send Back** or **Approve** invoices.



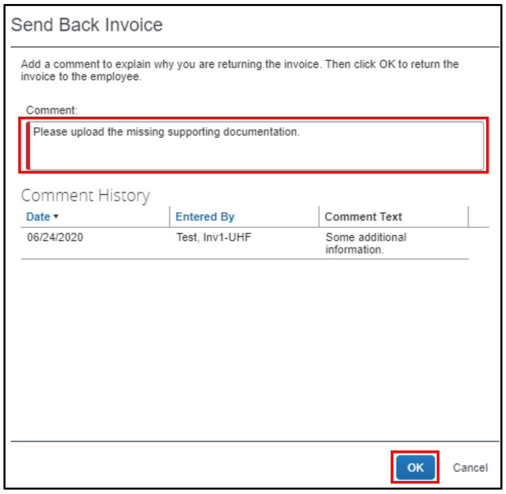
3. To review the details of the invoice, double-click the appropriate invoice, review it for accuracy, and then click **Approve**. If the total for any account being expensed for the invoice is $3000 or greater, the invoice will be automatically routed to the second approver.



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



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



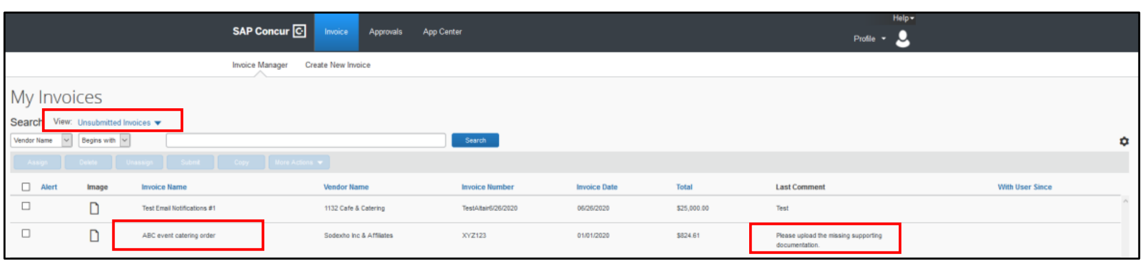
Correcting an Invoice

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

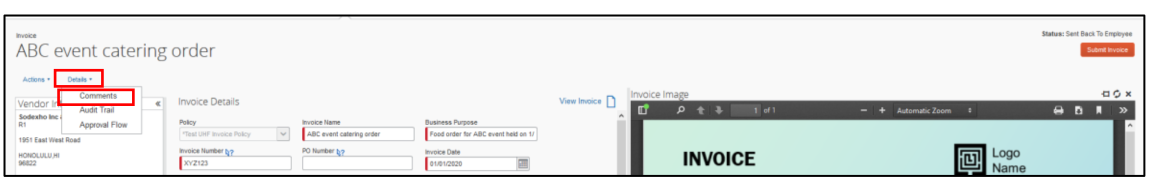
When an invoice is sent back to you for further action before approvals can be gained, the invoice becomes unsubmitted again and is in status **Sent Back To Employee**.

To provide additional information or correct a Sent Back invoice

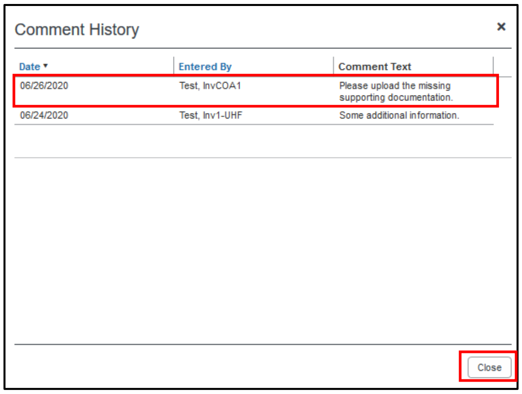
1. View invoices sent back on the **Invoice Manager** page, in the **Unsubmitted Invoices** view. The comment of the approver who **Sent Back** the invoice will be displayed under the Last Comment column. Click on the **Invoice Name** to open the invoice.



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



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



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

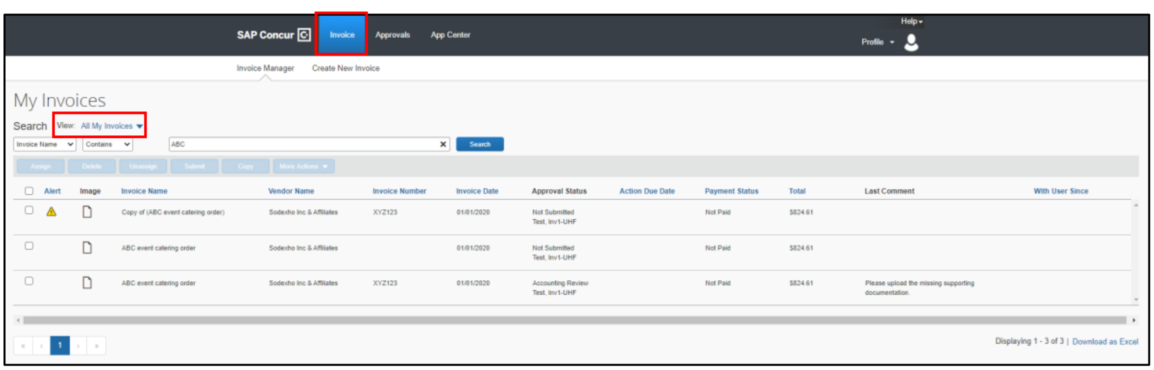
Viewing Invoice Status

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

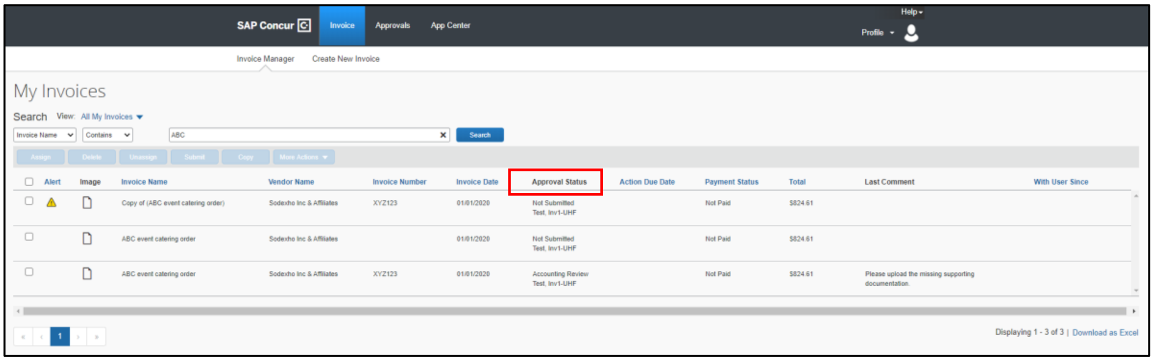
To view the status of an invoice

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**.

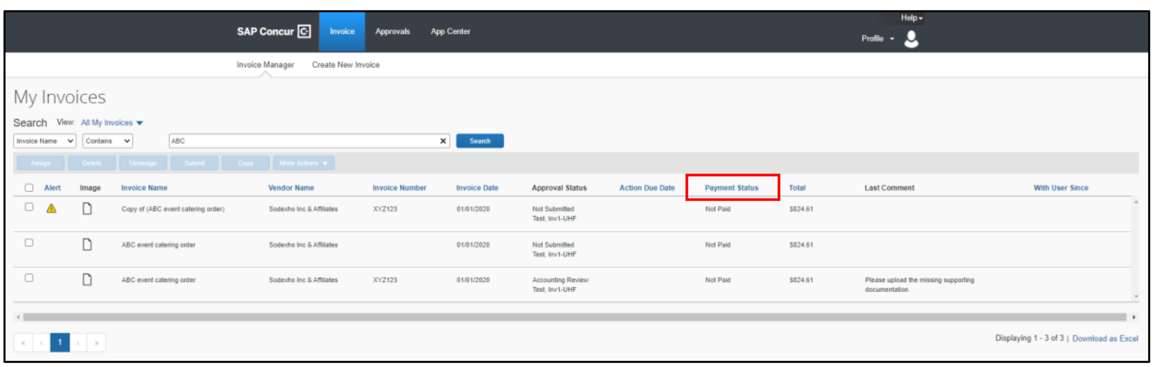


2. A list of all invoices that belong to the invoice owner will be displayed. The **Approval Status** indicates the current workflow step of an invoice.



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.



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.

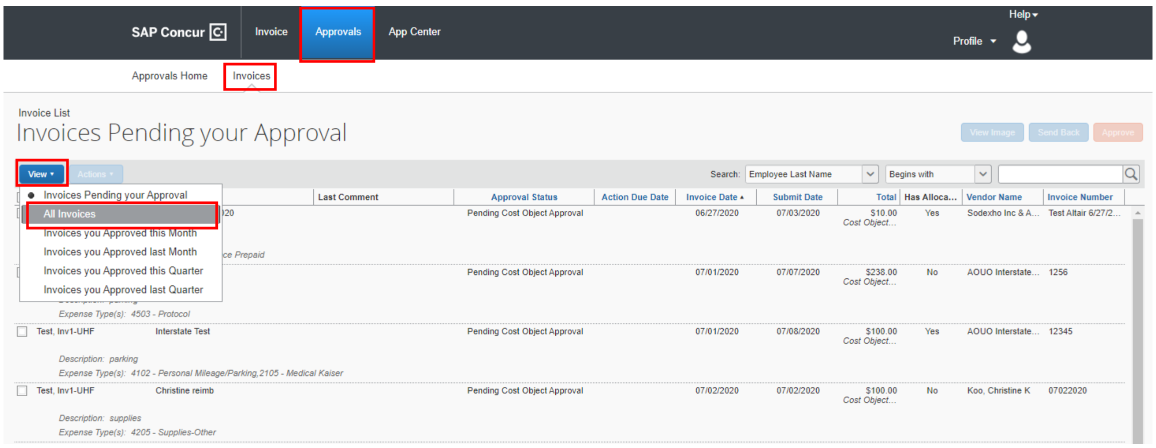
Viewing Approved Invoices

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**.



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

Recalling a Submitted Invoice

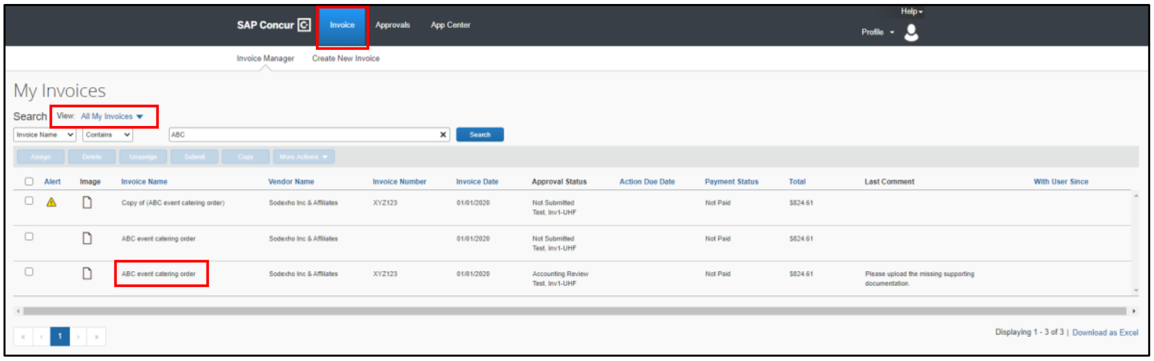
If at any time after you **Submit** an invoice you need to stop approvals or stop payment, for example, if you notice something needs to be corrected, you can **Recall** the invoice.

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**.

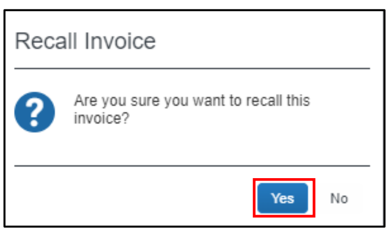
   From the **Invoice Manager** submenu, change the **View** to **All My Invoices** and locate the invoice you want to recall.



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.

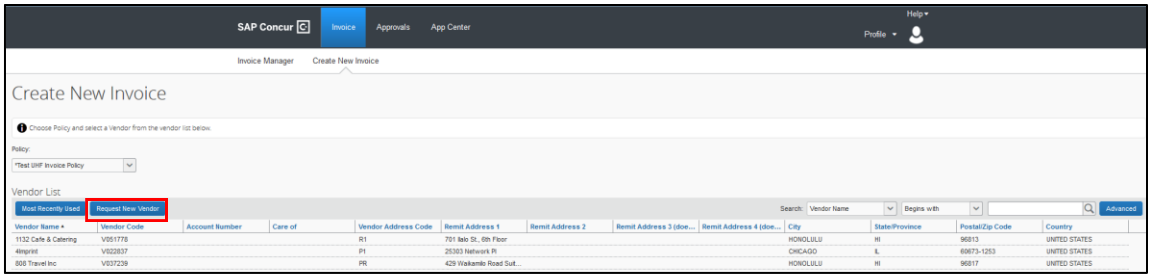
Requesting a New Vendor

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

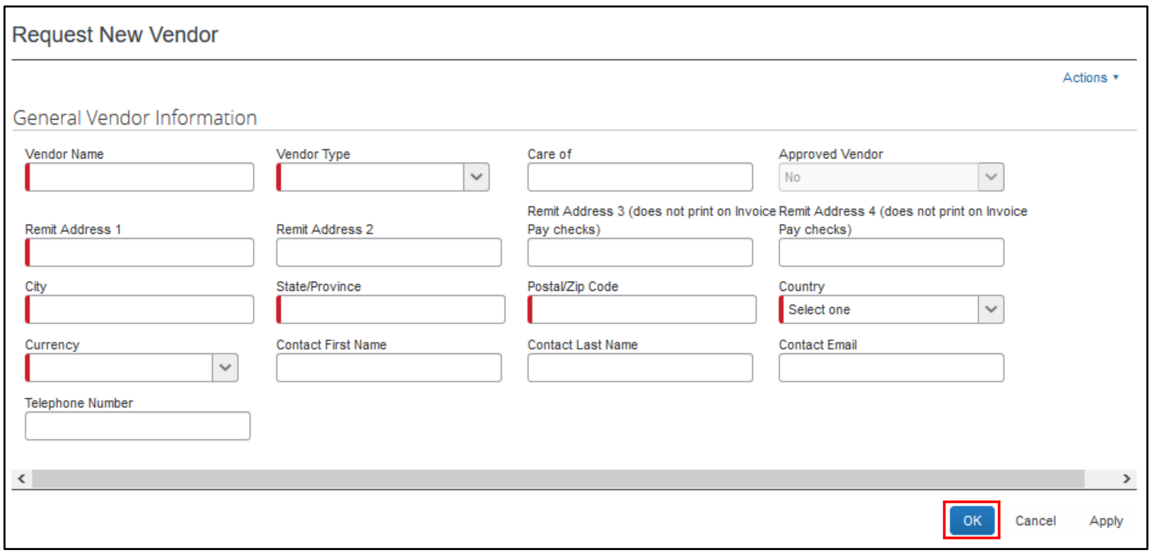
To request a new vendor

1. On the **Invoice** tab, click **Create New Invoice**.

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



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



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 Hawaiʻi 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.**

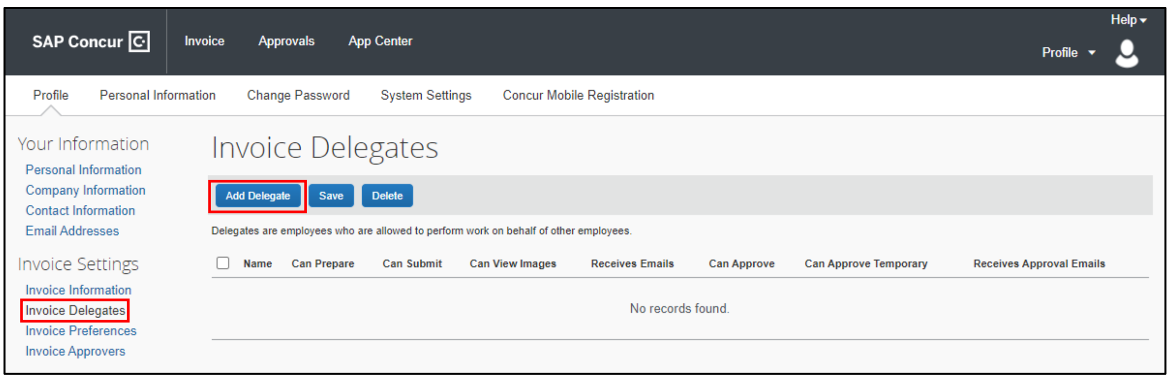
Assigning a Delegate

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

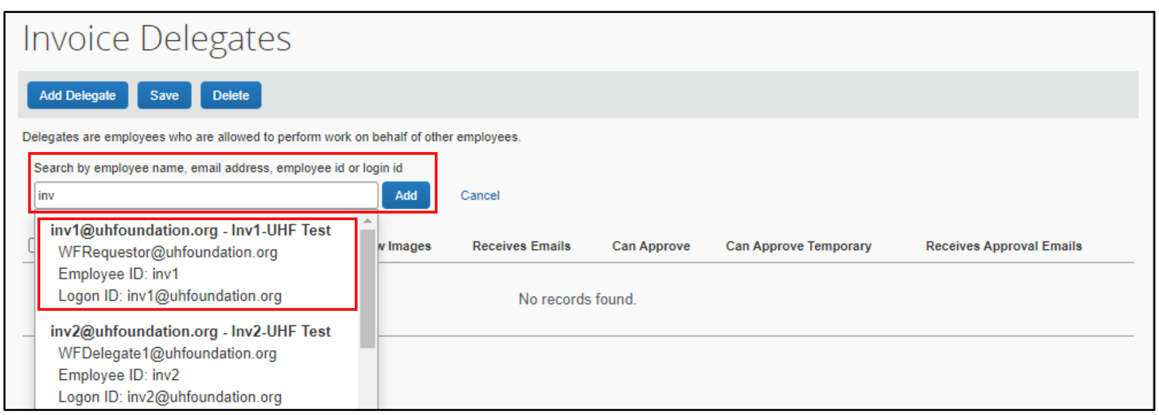
To assign a delegate:

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

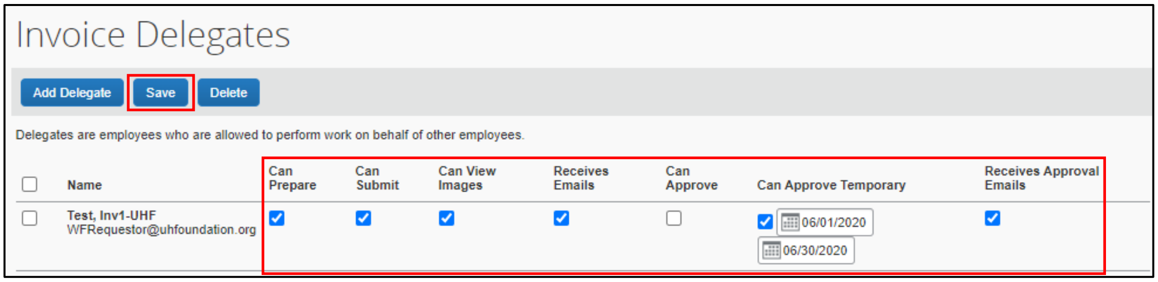
2. On the Invoice Delegates page, click on **Add Delegate**.



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**.



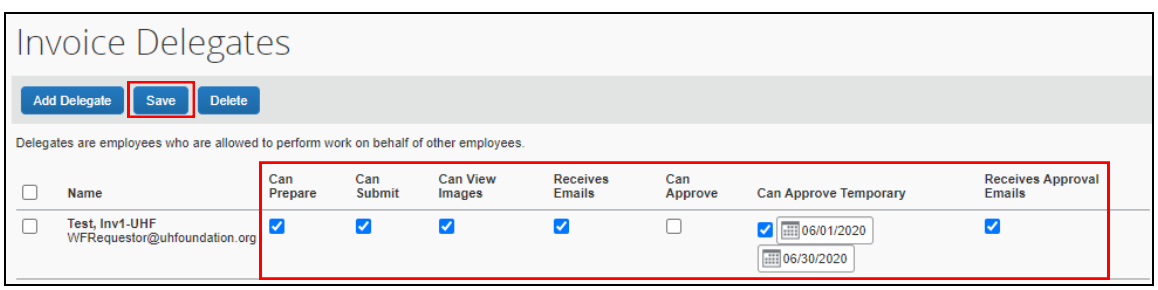
4. Select the tasks the delegate can complete on your behalf.



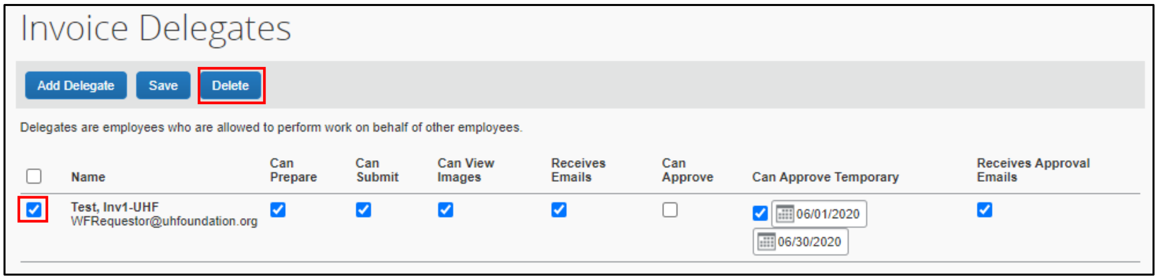
Delegate Option	Description
Can Prepare	The delegate can create invoices on your behalf.
Can Submit	The delegate can submit invoices on your behalf. NOTE: If you do not allow the delegate to submit, you receive an email notification when the delegate has completed the invoice and it is ready for submission.
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**.



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

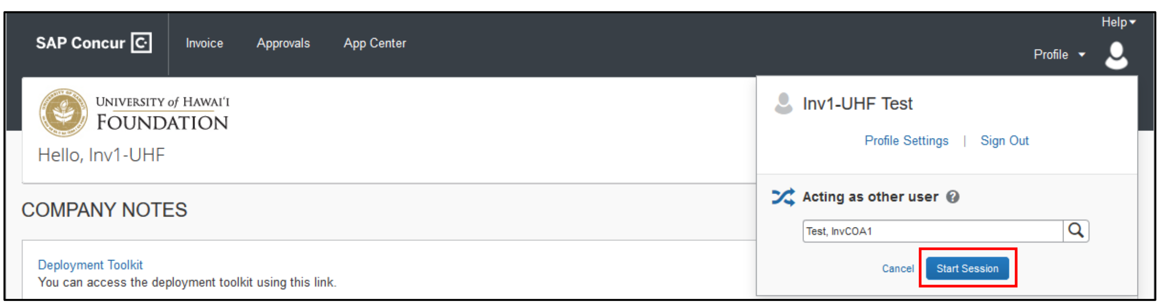


Acting as a Delegate

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.

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



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@concursolutions.com** or **EmailService@concursolutions.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**.