



UNIVERSITY *of* HAWAI'I®
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

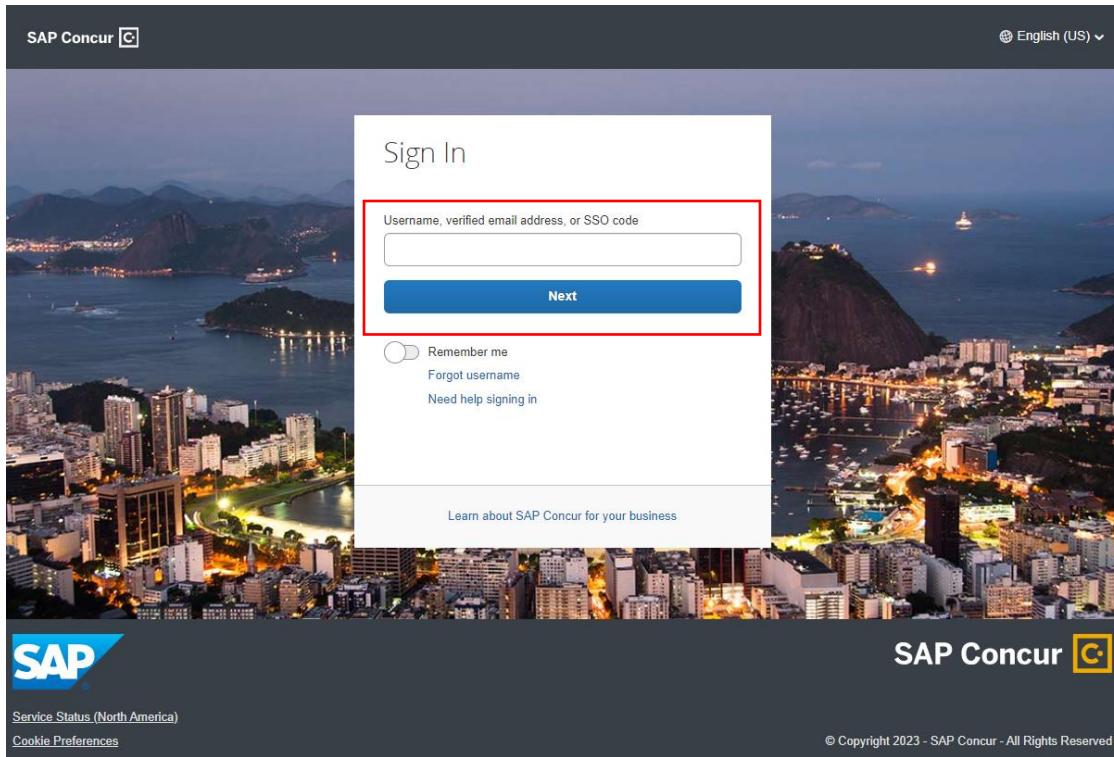
All active account administrators and support staff will automatically be granted access to Concur Invoice.

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>.

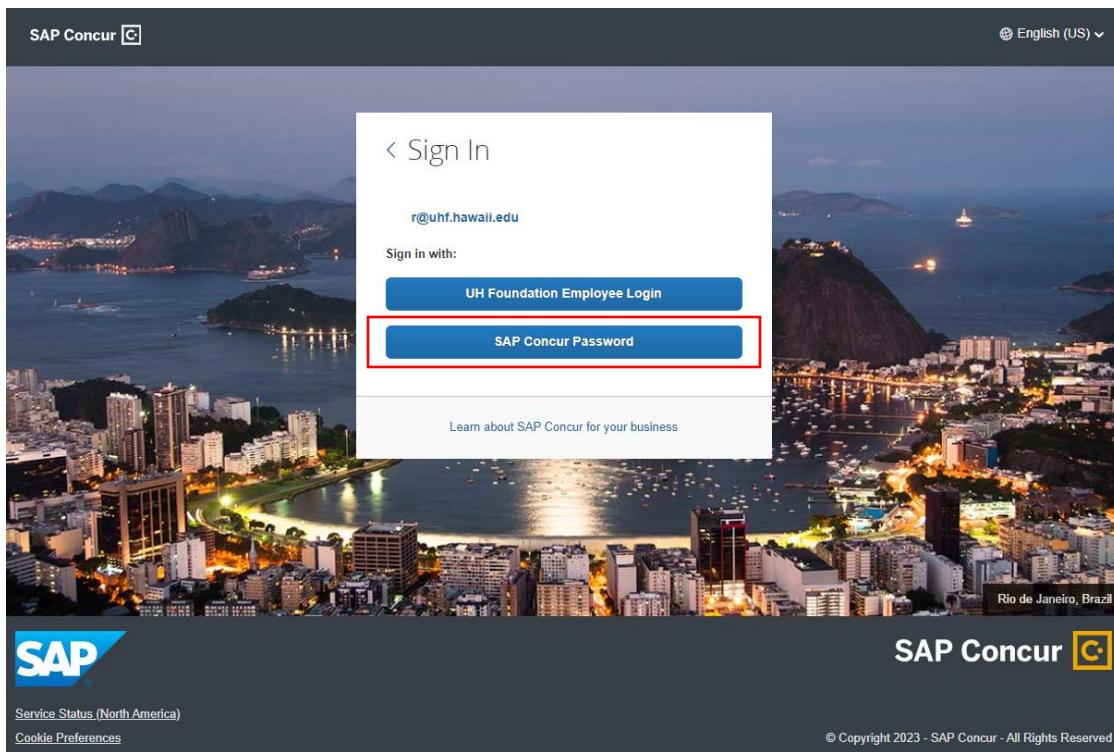
Signing Into Concur Invoice

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..**

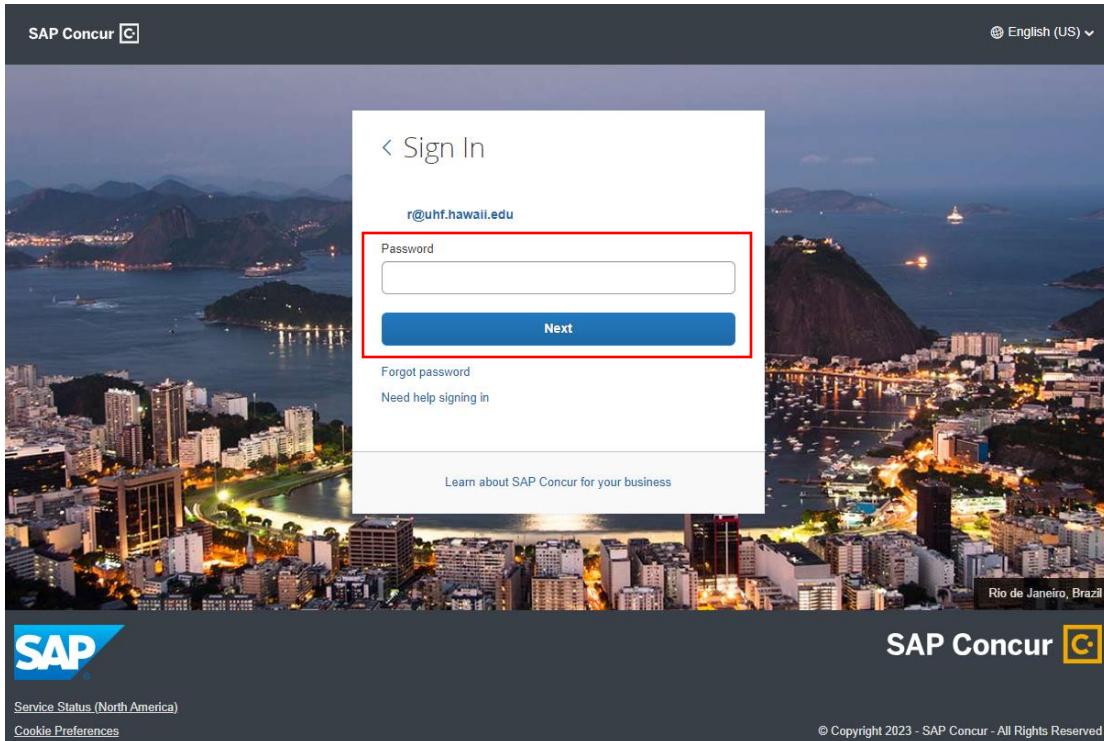
IMPORTANT: If you do not include “uhf” in your Concur Username, you will not be signed into UH Foundation’s Concur site and you may be signed into UH’s Concur site instead.



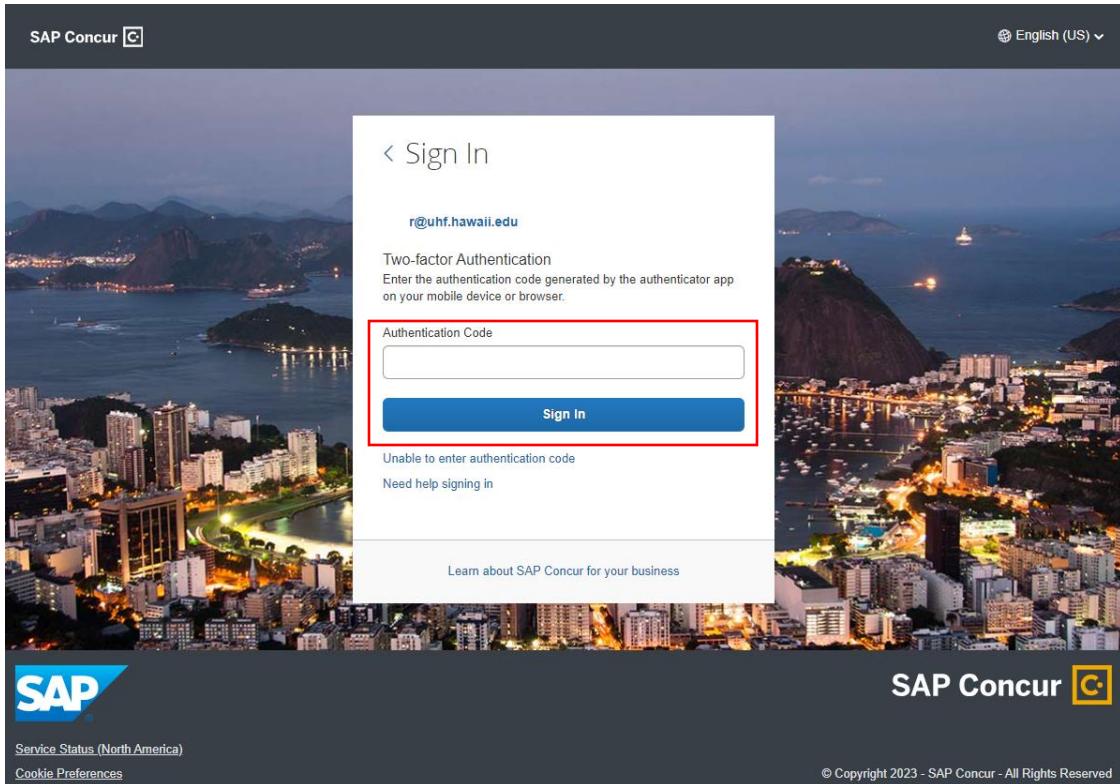
3. On the next page, select the **Sign in with SAP Concur Password** option.



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.”*



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

SAP Concur C Home AK

UNIVERSITY of H FOUNDAT

Company Notes

Sign up for direct deposits

Concur Invoice User Guide - UH Employees

Concur Invoice FAQ

Read more

My Tasks

00 Required Approvals → 01 Invoices →

Great! You currently have no approvals.

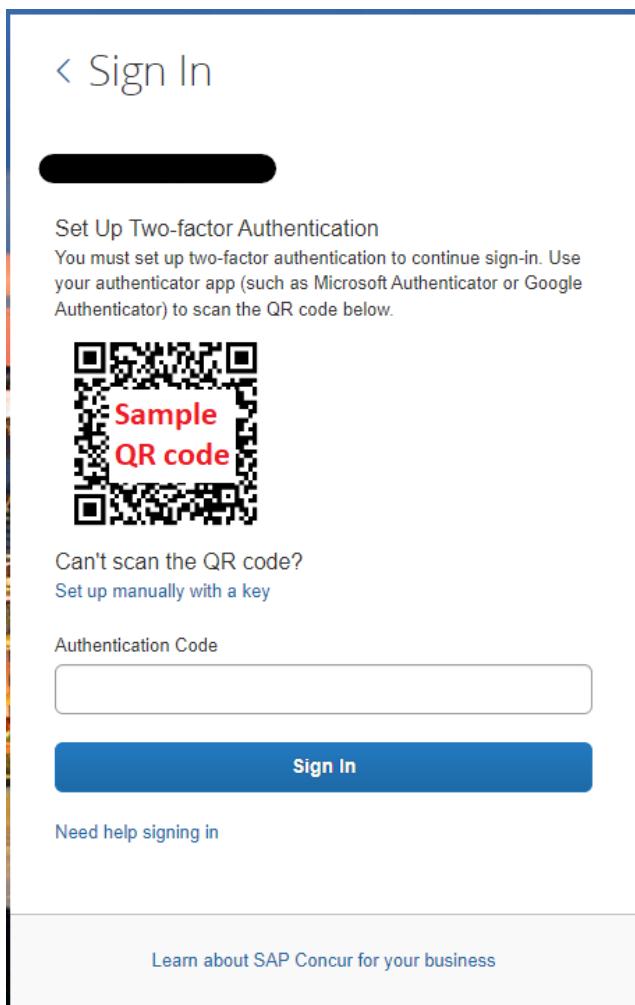
12/24 Test Invoice
\$1.00 - (University of Hawaii)

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**

The screenshot shows the SAP Concur homepage. At the top, there is a header with the SAP Concur logo, navigation links for Invoice, Approvals, and App Center, and a Profile dropdown. Below the header, the University of Hawai'i Foundation logo is displayed, along with a greeting message "Hello, Inv1-UHF". On the right side of the header, there are three status indicators: a red-bordered box containing a plus sign and the word "Invoice", "00 Required Approvals", and "00 Invoices". Below the header, there is a section titled "COMPANY NOTES" which includes links to the Deployment Toolkit and Concur Invoice Training Toolkit.

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

The screenshot shows the SAP Concur Invoice Manager page. The top navigation bar has "Invoice" selected, and the "Create New Invoice" button is highlighted with a red box. The main content area is titled "My Invoices" and displays a search interface with fields for "Vendor Name" and "Begins with", a search button, and action buttons for Assign, Delete, Unassign, Submit, Copy, and More Actions. Below the search interface, a message states "No Invoices" and "When invoices are added and assigned to you, they will appear in this list."

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

Vendor List												
Most Recently Used				Request New Vendor								
<div style="display: flex; justify-content: space-between;"> Search: Vendor Name Begins with <input type="text"/> Advanced </div>												
Vendor Na...	Vendor Code	Account N...	Care of	Vendor Adr...	Remit Addr...	Remit Addr...	Remit Addr...	Remit Addr...	City	State/Provi...	Postal/Zip ...	Country
1132 Cafe ...	V051778		R1	701 Iilo 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...
Sodexo In...	V022838		R1	1951 East ...					HONOLULU	HI	96822	UNITED ST...

Page 1 of 1 | [«](#) [»](#) [»»](#) | [Cancel](#)

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.

- 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

[Actions](#) • [Details](#) • [View Invoice](#) [Submit Invoice](#)

Vendor Information

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

Invoice Details

Policy	Invoice Name	Business Purpose	Invoice Number
*Test UHF Invoice Policy	ABC event catering order	Food order for ABC event held on 1/ Check Description (will print on check stub)	XY2123
Invoice Date	2nd Ref (16 Characters Max) ?	Currency	PO Number ?
01/01/2020	ABC event	USD-US, Dollar	00
Shipping (Fiscal use only)	Tax (Fiscal use only)	Request Total	Total Invoice Amount (incl S&T)
0.00	0.00	0.00	0.00
Project Number ?	Unit	Campus	Service Fiscal Year ?
1 (05042021) UHF Data & Tech	2 (UHF) Univ of Hawaii Funds	3 (UHF) UH Foundation	2020
Project Approver 2 ?	Comments	Department	Request # ?
6 (ONGU) Jason Ono	Some additional information.	4 (901) Administration	Project Approver 1
Project Approver 1 ?		5 (KOOC) Christine Koo	

[View](#) [Change](#) [Save](#)

Itemization Summary

<input type="checkbox"/> No.	Expense Type	Line Description	Quantity	Unit Price	Total
Amount Remaining to be Itemized: \$0.00					
No items found.					

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.

The screenshot shows a software interface for managing expense items. At the top, a message says "Amount Remaining to be Itemized: \$337.11". Below this is a table with one row, where the first column has a checkbox and the value "1". The second column is labeled "Expense Type" with the value "4503 - Protocol". The third column is "Line Description" with the value "Assorted pastries". The fourth column is "Quantity" with the value "150". The fifth column is "Unit Price" with the value "3.25". The total value in the last column is "\$487". To the right of the table, there is a section titled "Invoice Image Not Available" which contains a message about no invoice image being available. Below this is a detailed message about faxing images. At the bottom of the main screen, there is an "Add Item" dialog box. This dialog has fields for "No.", "Expense Type", "Line Description", "Quantity", "Unit Price", and "Total". The "Line Description" field is currently empty. The "Add" button is highlighted with a red box. At the very bottom of the interface, there are "Save" and "Cancel" buttons.

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
1	4503 - Protocol	Assorted pastries	150	3.25	\$487
2	4503 - Protocol	Coffee	4	75.00	\$300
<input checked="" type="checkbox"/> 3	4503 - Protocol	Sales tax	1	37.11	\$37

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.

If you use fax to add image, 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
<input checked="" type="checkbox"/>	4503 - Protocol	Sales tax	1	\$37.11	\$37.11

Update **Clear** **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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Distribute Selected Items	<input checked="" type="checkbox"/> Show Distributions	
Import Distributions					Amount Remaining to be Itemized: \$0.00
<input checked="" type="checkbox"/> 2	4503 - Protocol	Coffee	4	\$75.00	\$300.00
Account Code 4503 (System Default)		Distribution Code 05040201-UHF-UHF-901-KOOC-ONQJ-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%).

Distribute Selected Items

Distributions

Total: \$300.00 | Distributed: \$300.00 (100%) | Remaining: \$0.00 (0%)

Amount	Project Num...	Unit	Campus	Department	Project Appro...	Project Appro...	Division	Distribution Code
\$150.00	(05040201) U...	(UHF) Univ of...	(UHF) UH Fou...	(901) Administr...	(KODOC) Christi...	(ONOJ) Jason ...	GEN	05040201-UHF-UHF-901-KOOC-O...
\$150.00	(05040121) U...	(UHF) Univ of...	(UHF) UH Fou...	(901) Administr...	(SHIBATAK) K...	(ONOJ) Jason ...	GEN	05040121-UHF-UHF-901-SHIBATA...

Cancel **Save**

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

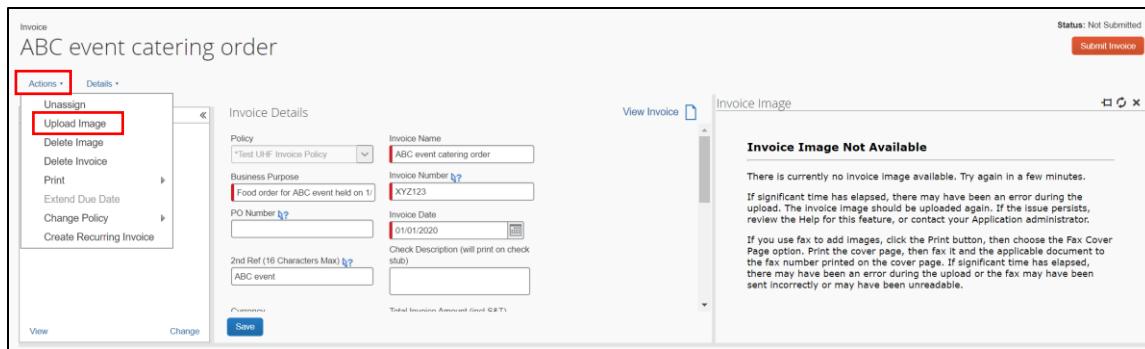
Per the UH Foundation [Account Administration Policy](#), it is required to upload a digital copy of the invoice, receipt(s) and any necessary supporting documentation. When uploading a copy of a paper receipt, please write "Submitted to UHF on <date>" on the paper receipt before scanning.

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

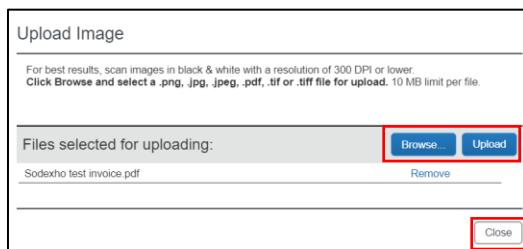
If your payment request requires you to submit required or supporting documents that contain sensitive information (e.g. social security numbers, etc.), please instead upload the documents to our secure file sharing site using the appropriate link below:

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

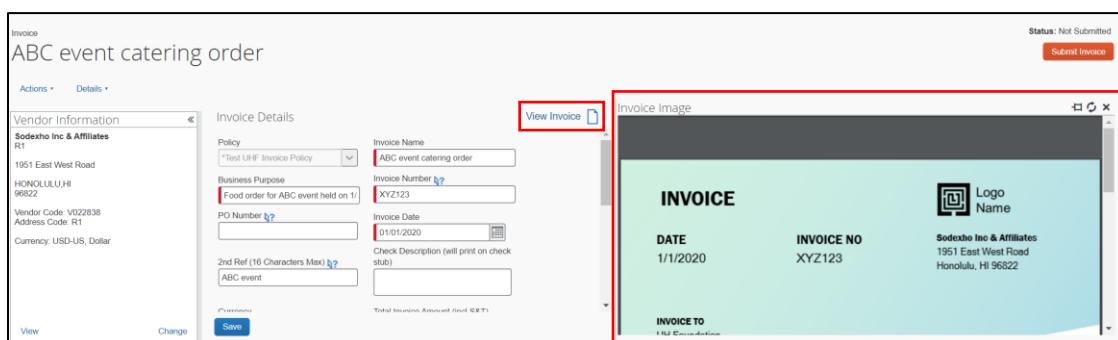
1. On the **Invoice** page, go to **Actions** then select **Upload Image**.



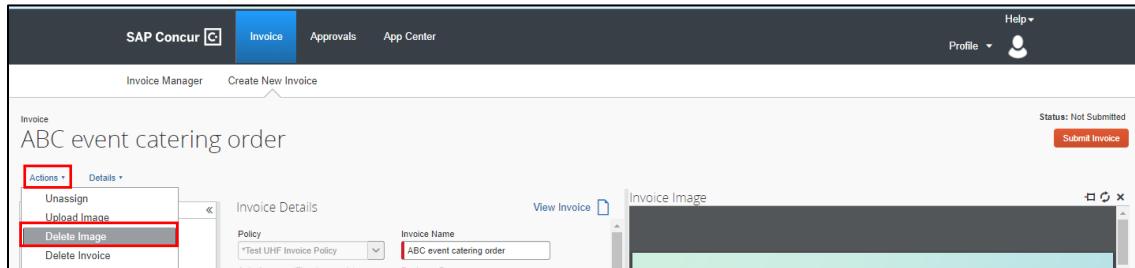
2. Select the invoice, receipt(s) and any necessary supporting documentation to upload by clicking **Browse**. Multiple documents can be uploaded at once. Once all documentation to upload has been selected, click **Upload**. Once all documents have been uploaded, click **Close**. Images can be in .png,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



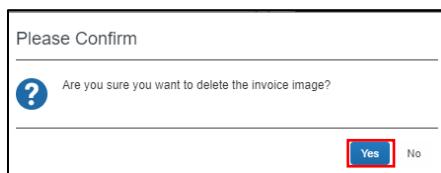
3. The upload documentation will appear in the **Invoice Image** pane. If you do not see the document(s), click on **View Invoice** in the **Invoice Details** section.



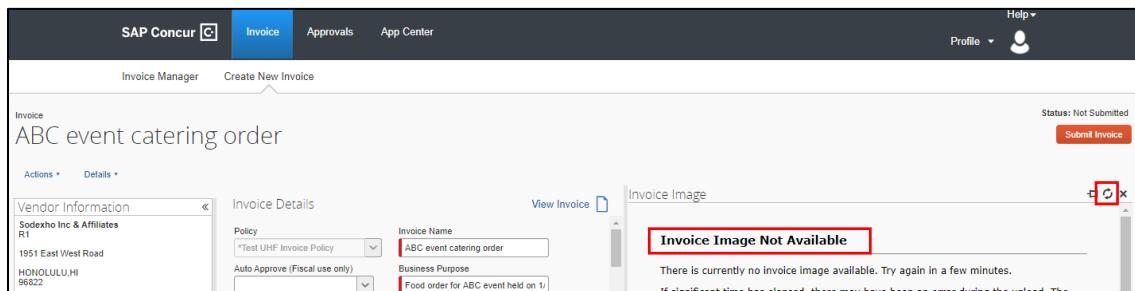
If the wrong invoice image is accidentally uploaded, you can delete the uploaded invoice image by going to **Actions** then **Delete Image**.



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.

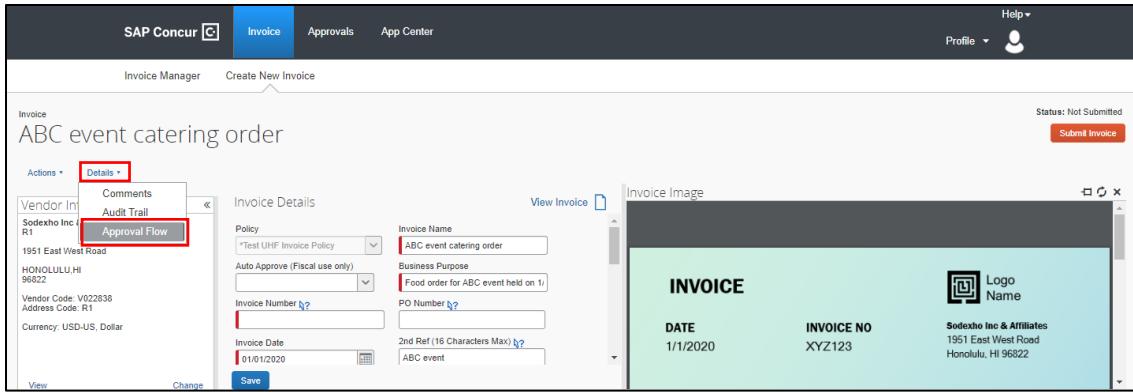


Step 5: Adding Additional Approvers

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.

The screenshot shows the 'Approval Flow' window for an invoice titled 'ABC event catering order'. Under 'Cost Object Approval', there are two entries: 'Jason Ono (05040201-UHF-UHF-901-KOOC-ONOJ) Test, InvCOA1' and 'Jason Ono (05040121-UHF-UHF-901-SHIBATAK-ONOJ) Test, InvCOA1'. A red box highlights the blue '+' icon next to the first entry. Other sections include 'Vendor Approval' and 'Back Office Approval', each with a single row and a '+' icon. At the bottom, there's a 'UHF Check Signer #1' field containing 'Test_InvCheck1', a 'Submit Invoice' button, and a 'Save Workflow' link.

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

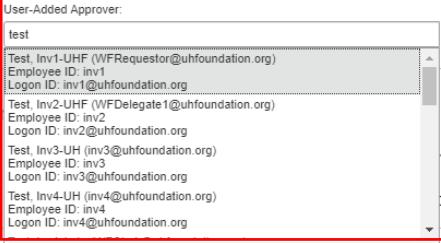
(this step may be skipped)

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-ONOJ) Test, InvCOA1

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

Vendor Approval:

+ ×

Submit Invoice

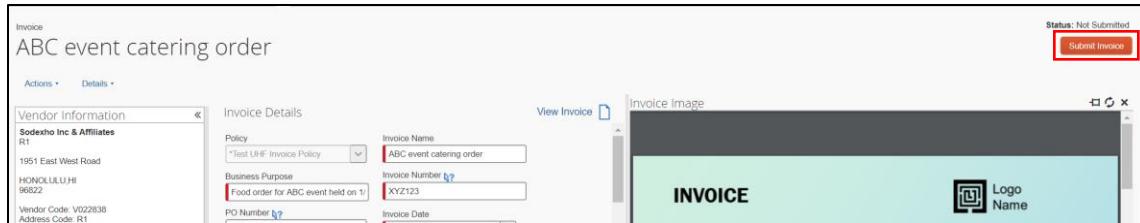
Save Workflow Cancel



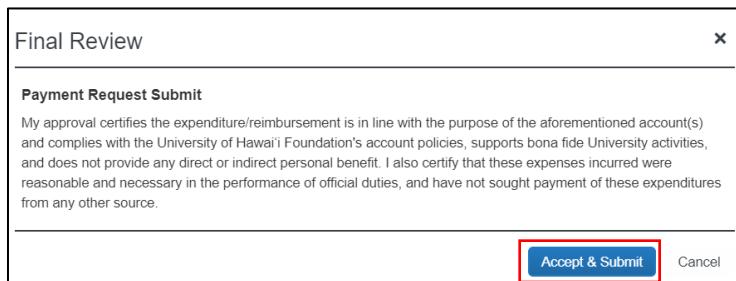
Step 6: Submitting an invoice

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

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



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

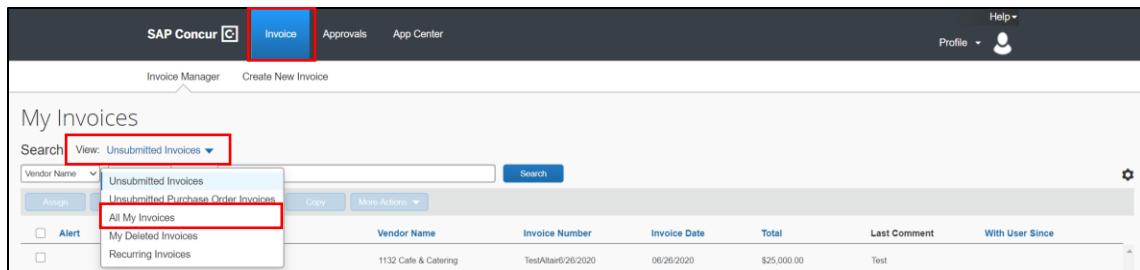


Creating a Recurring Invoice

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

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



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

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
□	□	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**.

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

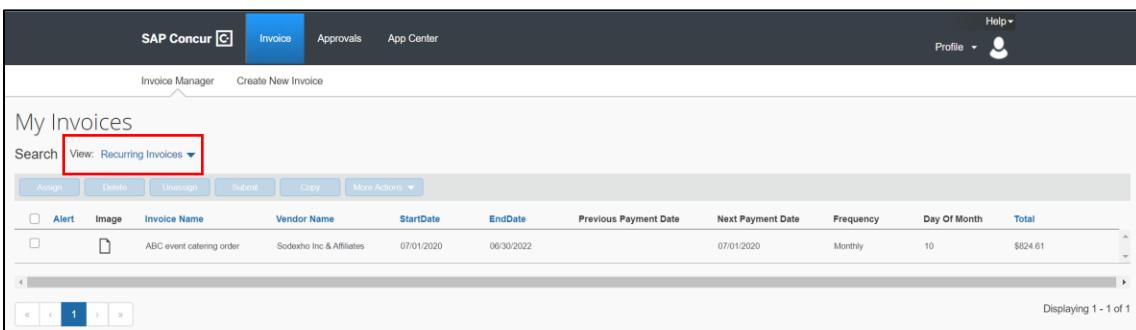
Note: The recurring invoices will be created 14 days prior to their scheduled payment due date

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).



Alert	Image	Invoice Name	Vendor Name	StartDate	EndDate	Previous Payment Date	Next Payment Date	Frequency	Day Of Month	Total
<input type="checkbox"/>	<input type="checkbox"/>	ABC event catering order	Sodexo Inc & Affiliates	07/01/2020	06/30/2022		07/01/2020	Monthly	10	\$824.01

Submitting Student Aid Payment Requests

To submit student aid payments:

- 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](#).
- Scholarships and Scholarship portions of Fellowships should still be processed through Star Giving Tree or Banner as usual.
- 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
- 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.
- 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:

- 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.
- 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.

The screenshot shows the 'Split Payment Test 8.17 Fall Payment' screen. In the 'Invoice Details' section, the 'Total Invoice Amount (incl S&T)' field is highlighted with a red box and contains '5,000.00'. In the 'Itemization Summary' table, the 'Unit Price' column for the single item (Account Code 4517 - Student Grants) is highlighted with a red box and contains '\$5,000.00'.

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

- 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

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

Invoice Details

Policy: *Test UHF Invoice Policy
Auto Approve (Fiscal use only): No
Business Purpose: Split Payment Test 8.17
Invoice Name: Split Payment Test 8.17 Fall Payment
Invoice Number: 42
Save

Invoice Image

PAYOUT INFORMATION
UHF Account # 123-4567-8 Title: Test Scholarship Account
Academic Year: 2020-2021 Total Award \$10,000 Scholarship Fellowship* Grant
*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/Mrs/Ms.

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
	Account Code	Distribution Code	Percentage	Net Amount	Gross Amount
	4517 [System Default]	T2801852-EN001-MA-005-BMORIOKA-CMATSUBA-GEN	100	\$5,000.00	\$5,000.00

Amount Remaining to be Itemized: \$0.00

Submit Invoice

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

My Invoices

Search View: All My Invoices

Vendor Name	Begins with	Search

Actions **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

Actions **Details**

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

Invoice Details

Policy: *Test UHF Invoice Policy
Auto Approve (Fiscal use only): No
Business Purpose: Split Payment Test 8.17
Invoice Name: Copy of (Split Payment Test 8.17 Fa
Invoice Number: 42
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

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	Distribution Code	Percentage	Net Amount	Gross Amount

Amount Remaining to be Itemized: \$0.00

Submit Invoice

Invoice
Split Payment Test 8.17 Spring Payment

Actions • Details •

Vendor Information

Concur, Invoice Test
PR
1314 S King St Suite B
HONOLULU HI
96814
Vendor Code: V070069
Address Code: PR
Currency: USD-US, Dollar

Invoice Details

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

Invoice Image

PAYMENT REQUEST FORM FOR STUDENT AID RECIPIENTS
Not for services rendered
Allow two weeks for processing*

UNIVERSITY OF HAWAII FOUNDATION

PAYMENT INFORMATION
UHF Account # 123-4567-8 Title: Test Scholarship Account
Academic Year: 2020-2021 Total Award: \$10,000 Scholarship Fellowship* Grant
*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.

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	Distribution Code	Percentage	Net Amount	Gross Amount

- 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

- 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.

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

- 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**.

No.	Expense Type	Line Description	Quantity	Unit Price	Total
1	4503 - Protocol	Assorted pastries	150	\$3.25	\$487.50
2	4503 - Protocol	Coffee	4	\$75.00	\$300.00

- 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 shows the SAP Concur home page interface. At the top, there is a navigation bar with tabs: SAP Concur (with a logo), Invoice, Approvals (which is highlighted with a red box), and App Center. To the right of the navigation are Help, Profile, and a user icon. Below the navigation, the header displays the University of Hawai'i Foundation logo and the greeting "Hello, InvCOA1". On the right side of the header, there are three summary boxes: "+ Invoice" (02 Required Approvals), "02 Required Approvals", and "00 Invoices".

The main content area is divided into sections: COMPANY NOTES and MY TASKS. The COMPANY NOTES section contains links to the Deployment Toolkit and Concur Invoice Training Toolkit. The MY TASKS section contains two cards. The first card, titled "Required Approvals" (with a red box around it), shows "02" required approvals and lists two invoices: "Inv1-UHF T. | ABC event catering order \$824.61 — Invoice" and "Inv1-UHF T. | Paul - TEST WF TIME OUT \$100.00 — Invoice". The second card, titled "Invoices", shows "00" invoices and a message: "You currently have no active invoices." A large checkmark icon is present in this card's area.

At the bottom of the page, there is a footer with the SAP logo on the left and the SAP Concur logo on the right.

- 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.

The screenshot shows the SAP Concur Approvals interface. At the top, there are tabs for 'Invoice', 'Approvals' (which is selected and highlighted in blue), and 'App Center'. On the right, there are 'Help', 'Profile', and user icon buttons. Below the tabs, there are links for 'Approvals Home' and 'Invoices'. The main area is titled 'Approvals' and contains a table for 'Invoices'. The table has columns: 'Invoice Name', 'Employee Name', 'Submit Date', 'Invoice Date', and 'Total'. Two rows are visible: 'ABC event catering order' (Employee Name: Test, Inv1-UHF; Submit Date: 06/27/2020; Invoice Date: 01/01/2020; Total: \$824.61) and 'Paul - TEST WF TIME OUT' (Employee Name: Test, Inv1-UHF; Submit Date: 06/18/2020; Invoice Date: 06/08/2020; Total: \$100.00). The first row is highlighted with a red box.

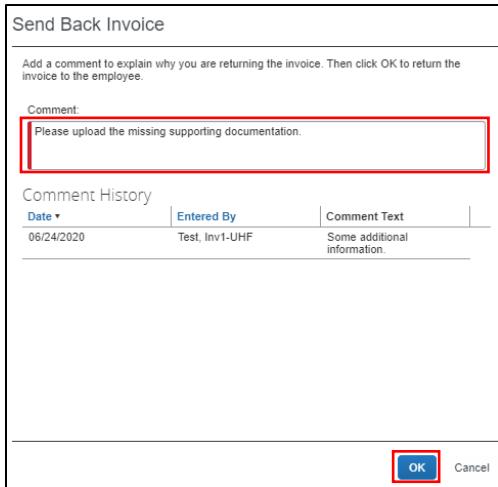
- To review the details of the invoice, double-click the appropriate invoice, review it for accuracy, and then click **Approve**. If the total for any account being expensed for the invoice is \$3000 or greater, the invoice will be automatically routed to the second approver.

The screenshot shows the SAP Concur Invoice details page for the 'ABC event catering order'. The top bar displays the invoice name 'ABC event catering order' and the status 'Status: Pending Cost Object Approval' with 'Send Back' and 'Approve' buttons. The left sidebar shows 'Vendor Information' for Sodexo Inc & Affiliates. The main area is divided into 'Invoice Details' and 'Invoice Image'. The 'Invoice Details' section includes fields for Policy (*Test UHF Invoice Policy), Business Purpose (Food order for ABC event held on 1/1), PO Number (1234567890), Invoice Date (01/01/2020), and Check Description. The 'Invoice Image' section shows a preview of the invoice document with the date 1/1/2020 and invoice number XYZ123. The 'Send Back' button is highlighted with a red box.

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

The screenshot shows the SAP Concur Invoice details page for the 'ABC event catering order', similar to the previous one but with a different visual style. The top bar displays the invoice name 'ABC event catering order' and the status 'Status: Pending Cost Object Approval' with 'Send Back' and 'Approve' buttons. The left sidebar shows 'Vendor Information' for Sodexo Inc & Affiliates. The main area is divided into 'Invoice Details' and 'Invoice Image'. The 'Invoice Details' section includes fields for Policy (*Test UHF Invoice Policy), Business Purpose (Food order for ABC event held on 1/1), PO Number (1234567890), Invoice Date (01/01/2020), and Check Description. The 'Invoice Image' section shows a preview of the invoice document with the date 1/1/2020 and invoice number XYZ123. The 'Send Back' button is highlighted with a red box.

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.

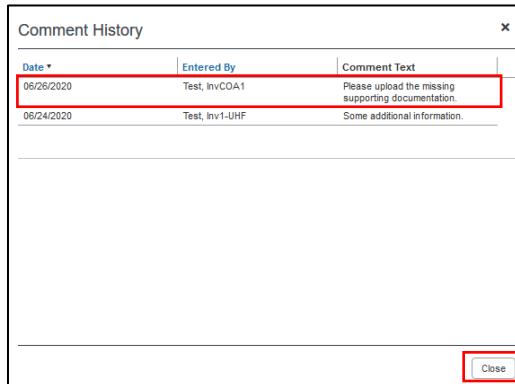
When an invoice is sent back to you for further action before approvals can be gained, the invoice becomes unsubmitted again and is in status **Sent Back To Employee**.

To provide additional information or correct a Sent Back invoice

- 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.

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

- 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**.



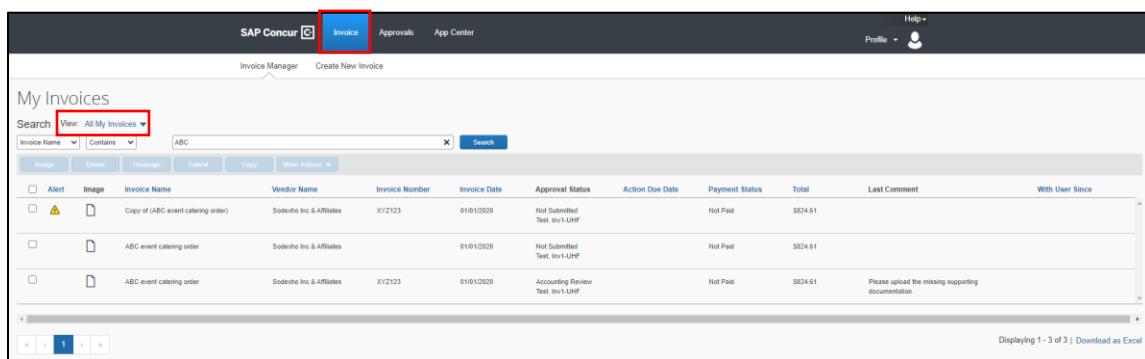
Viewing Invoice Status

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.

The screenshot shows the SAP Concur Invoice interface. At the top, there are tabs for SAP Concur, Invoice, Approvals, and App Center. Below the tabs, there's a search bar with dropdown menus for 'Search' and 'View'. The main area is titled 'My Invoices' and contains a table of invoices. The columns include Alert, Image, Invoice Name, Vendor Name, Invoice Number, Invoice Date, Approval Status, Action Due Date, Payment Status, Total, Last Comment, and With User Since. The 'Approval Status' column is highlighted with a red box. The table shows three rows of invoice data.

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.

The screenshot shows the SAP Concur Invoice interface, similar to the previous one but with a different focus. The 'Payment Status' column is highlighted with a red box. The table structure is identical to the first screenshot, showing three rows of invoice data with columns for Approval Status, Action Due Date, and Payment Status.

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**.

The screenshot shows the SAP Concur Approvals interface. At the top, there's a navigation bar with 'SAP Concur', 'Invoice', 'Approvals' (which is highlighted with a red box), and 'App Center'. Below the navigation bar is a sub-menu for 'Approvals Home' and 'Invoices' (also highlighted with a red box). The main area is titled 'Invoice List' and 'Invoices Pending your Approval'. A 'View' dropdown is open, showing options: 'Invoices Pending your Approval' (radio button selected) and 'All Invoices' (highlighted with a red box). The table below lists several invoices with columns for Last Comment, Approval Status, Action Due Date, Invoice Date, Submit Date, Total, Has Allocat..., Vendor Name, and Invoice Number. Each row also includes a 'Cost Object...' link. The table has a header row with filters: Search (Employee Last Name, Begins with), a search icon, and a refresh icon.

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**.

The screenshot shows the SAP Concur Invoice interface. At the top, there are tabs for 'SAP Concur', 'Invoice' (which is selected), 'Approvals', and 'App Center'. On the right, there are links for 'Help', 'Profile', and a user icon. Below the tabs, there are buttons for 'Invoice Manager' and 'Create New Invoice'. The main area is titled 'Create New Invoice' with a sub-instruction: 'Choose Policy and select a Vendor from the vendor list below.' A dropdown menu labeled 'Policy' is open, showing 'Test UH Foundation' as the selected option. Below this is a 'Vendor List' table with columns: Vendor Name, Vendor Code, Account Number, Care of, Vendor Address Code, Remit Address 1, Remit Address 2, Remit Address 3 (does not print on invoice), Remit Address 4 (does not print on invoice), City, State/Province, Postal/Zip Code, and Country. The table contains three rows of data. At the bottom of the list is a search bar with fields for 'Vendor Name', 'Begins with', and a search icon, along with an 'Advanced' link. A red box highlights the 'Request New Vendor' button at the bottom of the list.

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

The screenshot shows the 'Request New Vendor' form. At the top, it says 'Request New Vendor' and has an 'Actions' dropdown. Below is a section titled 'General Vendor Information' with various input fields. Most fields have a red border around them. The fields include: Vendor Name, Vendor Type (dropdown), Care of, Approved Vendor (dropdown), Remit Address 1, Remit Address 2, Remit Address 3 (Pay checks), Remit Address 4 (Pay checks), City, State/Province, Postal/Zip Code, Country (dropdown), Currency (dropdown), Contact First Name, Contact Last Name, Contact Email, and Telephone Number. At the bottom right, there are buttons for 'OK' (highlighted with a red box), 'Cancel', and '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.

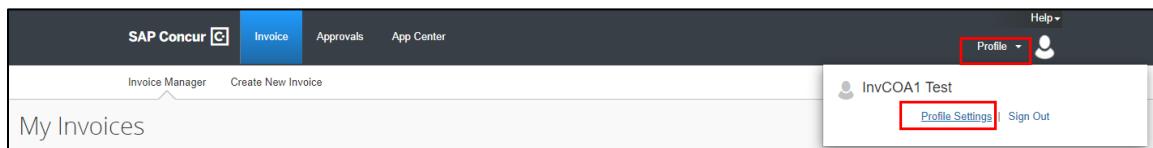
Complete the [Authorization Agreement for Direct Deposits Via ACH \(ACH Credits\) form](#) to request payment of expense reimbursements (for UH Foundation and UH/RCUH employees) and vendor invoices by ACH method. **Please allow approximately one week for the account to be setup and activated before the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

Assigning a Delegate

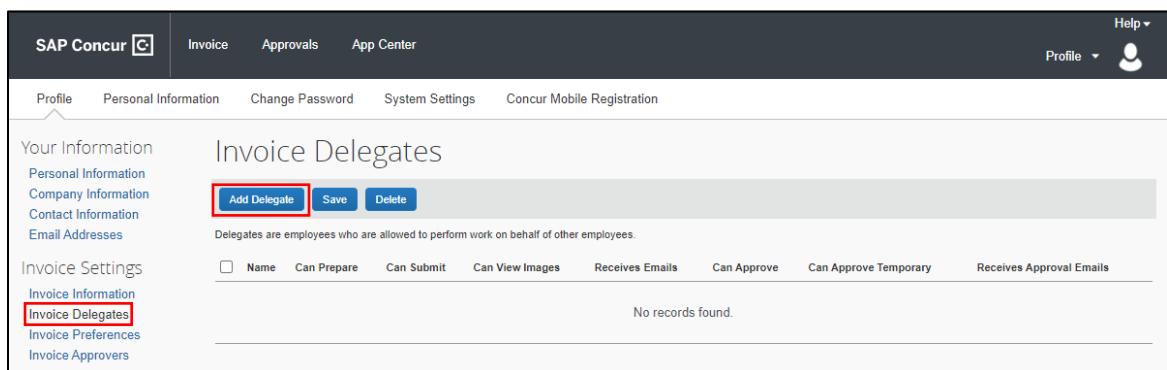
You can add **Invoice Delegates** to act on their behalf, defining specific tasks that the delegate can complete.

To assign a delegate:

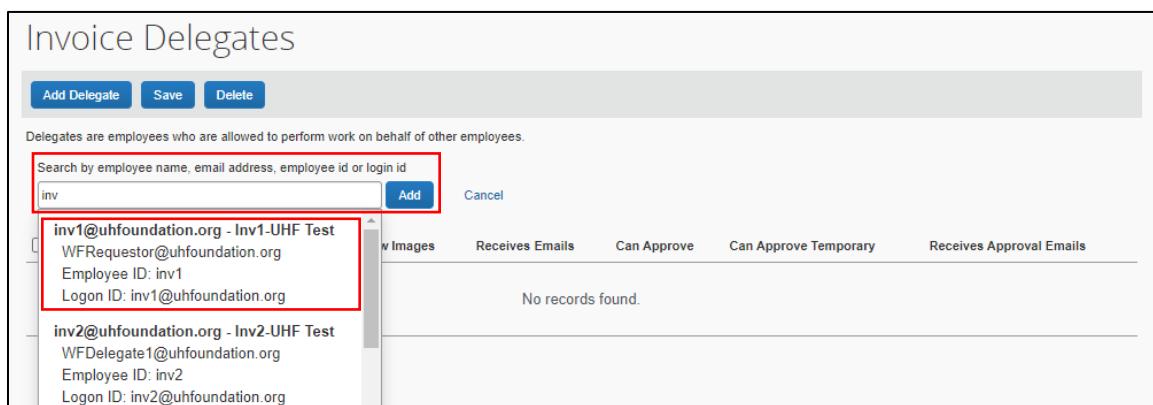
1. In the top navigation bar, click on **Profile** and select **Profile Settings**.



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

Add Delegate	Save	Delete					
Delegates are employees who are allowed to perform work on behalf of other employees.							
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	<input checked="" type="checkbox"/> 06/30/2020

Acting as a Delegate

To perform delegate duties:

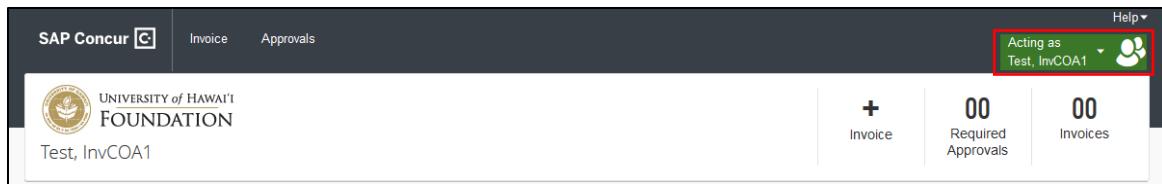
1. In the top navigation bar, click on **Profile** and select the user to perform duties on behalf of in the **Acting as other user** section. This section only appears if you have been assigned delegate options by another user. Clicking into the **Search by name or ID** field will display all the users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

The screenshot shows the SAP Concur profile interface. The top navigation bar includes links for SAP Concur, Invoice, Approvals, and App Center. On the right, there is a 'Profile' dropdown menu. Below the navigation, the user's name 'Hello, Inv1-UHF' and the University of Hawai'i Foundation logo are displayed. A 'COMPANY NOTES' section contains links for 'Deployment Toolkit' and 'Concur Invoice Training Toolkit'. On the right side, under 'Profile Settings', there is a section titled 'Acting as other user' with a search bar and a list of users. One user, 'Test, InvCOA1', is listed with details: WFAA1@uhfoundation.org (Email), Employee ID: invcoa1, and Logon ID: invcoa1@uhfoundation.org. A red box highlights this list.

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

This screenshot shows the same SAP Concur profile interface as the previous one, but with a red box highlighting the 'Start Session' button in the 'Acting as other user' section. The user 'Test, InvCOA1' is still listed in the search results.

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**.