

## **BWF's Guide to Concur Expense for Non-Staff**

Burroughs Wellcome Fund (BWF) uses SAP's cloud based Concur Expense for submitting and processing reimbursements. This guide is focused on the website platform (not the mobile app) and its use by non-Staff.

This Guide will take users through the fundamental use of Concur Expense from start to finish. While this Guide is by no means exhaustive in its content, it does provide a resource for the most common scenarios when submitting a reimbursement report.

For **Concur technical** support, Click "Help" at the top-right of the page, or the "?" icon, and then "Contact Support". The "Contact Support" link may also be on the lower left of the SAP Concur home page.

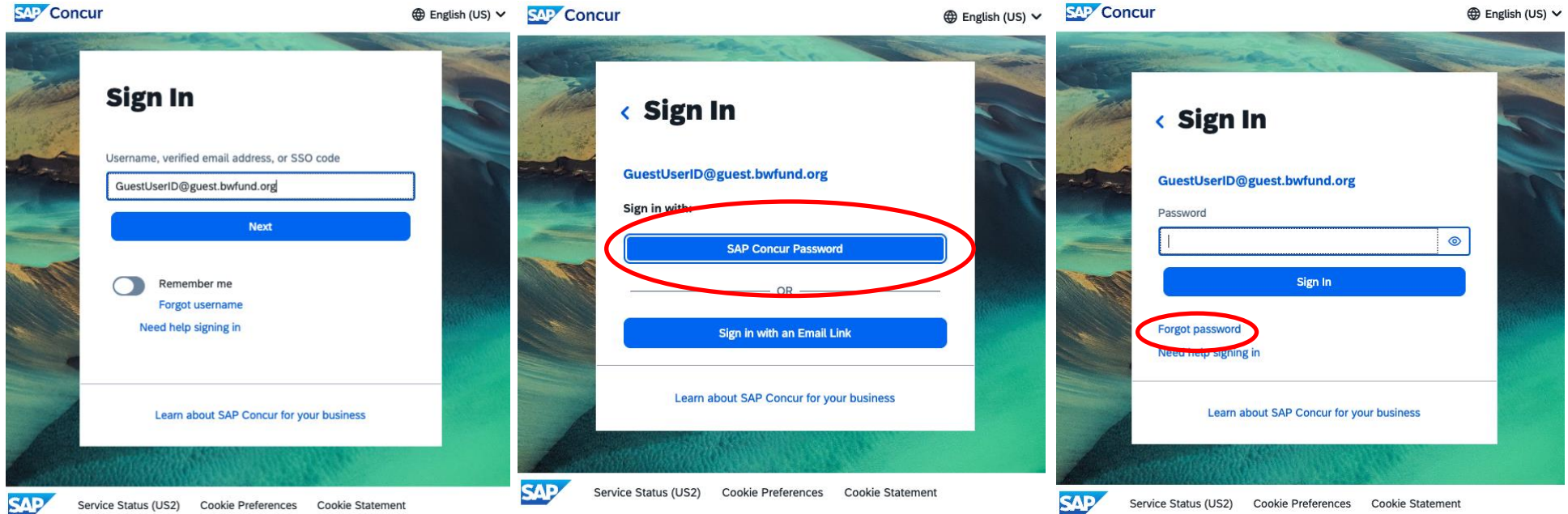
BWF aims to process reports within 2 weeks of submission. However, this may be longer during times of higher volume.

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## Logging into Concur

To access Concur Expense, go to [www.concursolutions.com](http://www.concursolutions.com). You should have received a personalized email with your BWF-specific login username and additional details related to your reimbursement. If this is the first time you are logging into Concur with BWF, you MUST utilize “Forgot password”. If you have previously used Concur with BWF, use the same password you used last time. If you do not remember that password, please utilize “Forgot password”. If you find you still need assistance with logging in, please reach out to the contact person listed in the email with your username.



## Concur Homepage

Once logged into Concur, the homepage will appear. Depending on access rights, users may see differing layouts based on the screenshot below. All reports that need to be submitted, have been returned, or require some other action, are listed under the **Open Reports** section.

The screenshot displays the SAP Concur homepage. At the top left, there is a navigation menu with icons for home, dashboard, messages, profile, and settings. The main header features the SAP Concur logo and a notification banner stating, "You haven't signed up to receive e-receipts. Sign up here". Below the header, the "Flight Search" section is visible, including options for Round-trip, One-way, and Multi-city, and input fields for From, To, and Dates. The "Expense Reports" section is highlighted with a red circle and shows "No Reports" with a plus sign to add reports. The "Available Expenses" section shows "No Available Expenses".

**SAP Concur**

You haven't signed up to receive e-receipts. [Sign up here](#)

**Company Notes**

By way of accessing and/or utilizing any of our services, you agree that your personal data will be used in accordance with BCD's Global Privacy Policy.

**KNOW BEFORE YOU GO**

WORLD TRAVEL SERVICE welcomes you to Concur Travel [Read More](#)

**Flight Search**

Round-trip One-way Multi-city

From \*  
Enter location

To \*  
Enter location

Dates \*  
04/16/2026 - 04/17/2026

Cabin  
Any Cabin

Include Accommodation

**Search Flights**

**Available Expenses**

**No Available Expenses**  
When you have available expenses, you'll see them here

**Expense Reports**

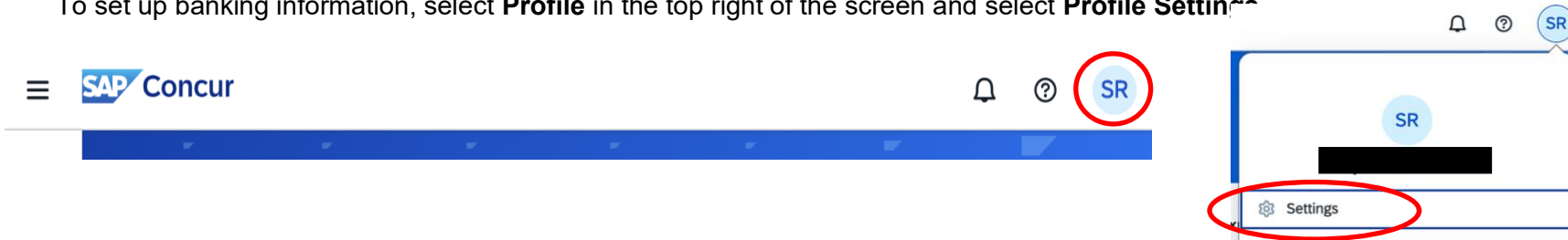
**No Reports**  
When you have reports, you'll see them here.

## Payment Settings

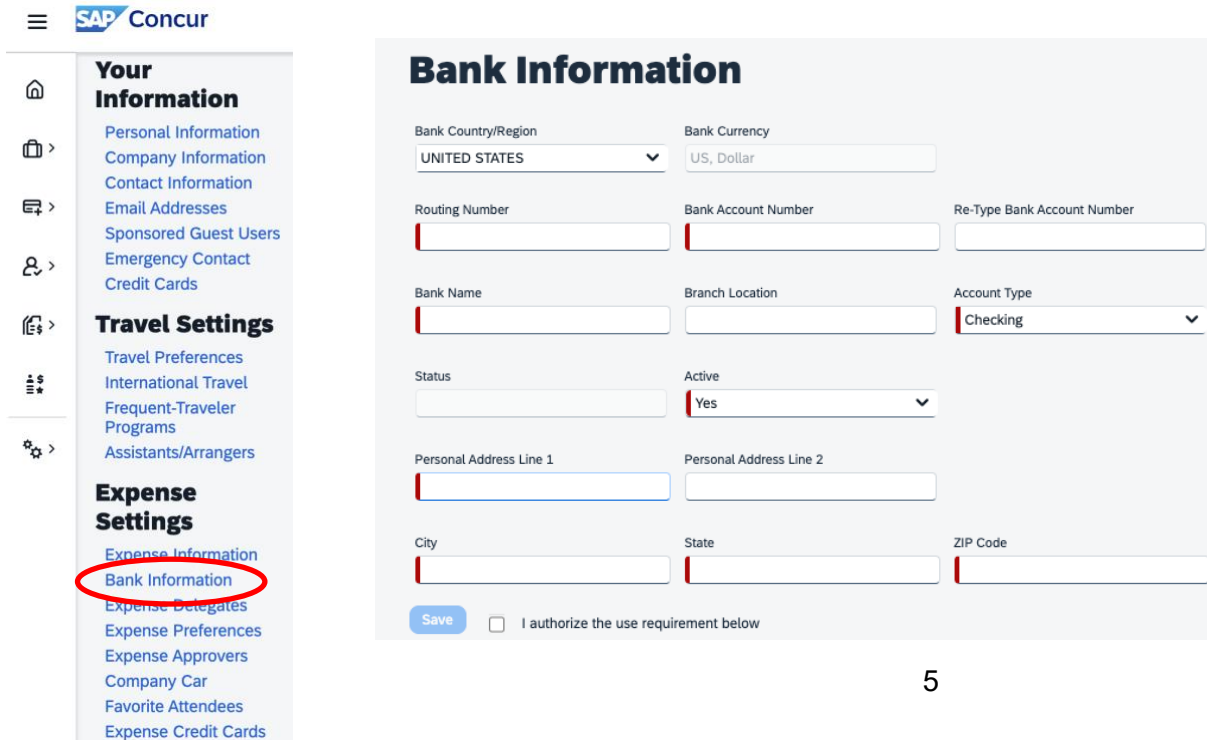
BWF utilizes SAP Concur's **Expense Pay** to process electronic fund transfers (EFTs) for all U.S. based travelers. If this is your first time using Concur with BWF, you will be prompted to set up the bank account where you would like your reimbursement deposited before you can submit your report.

**NOTE:** If you are outside the U.S., a paper check will be mailed to the address in your personalized email.

To set up banking information, select **Profile** in the top right of the screen and select **Profile Settings**

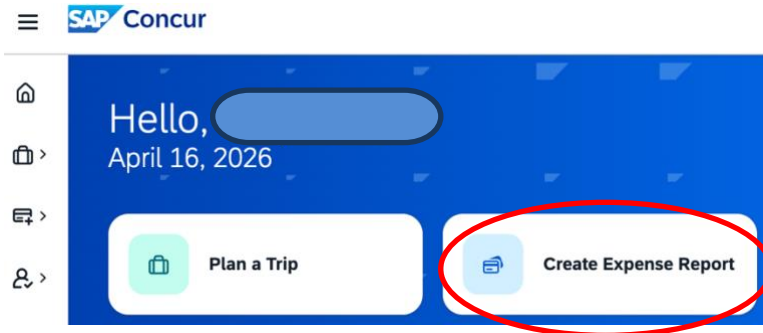


The link for **Bank Information** will be on the left of the screen under the heading **Expense Settings**.



## Creating a New Report

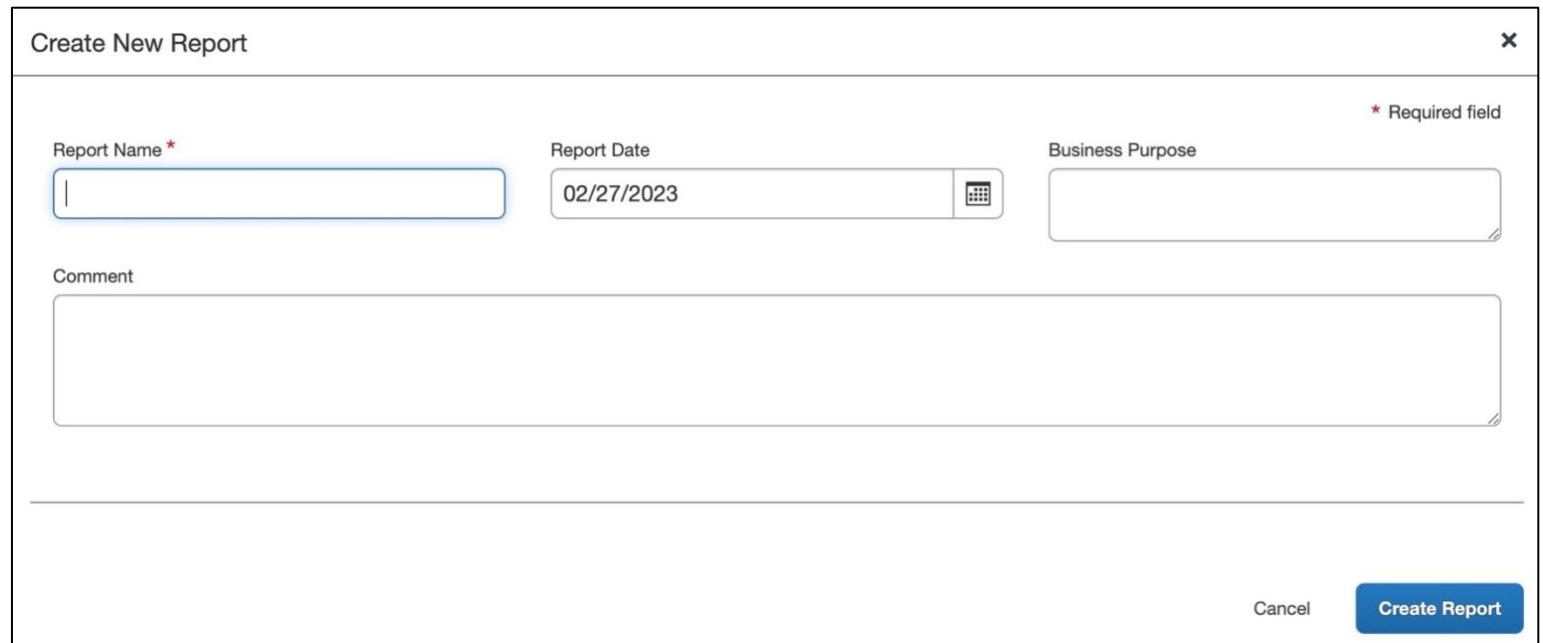
To create a new report, select “Start a Report” from the homepage.



## Report Header

The Report Header is shown below.

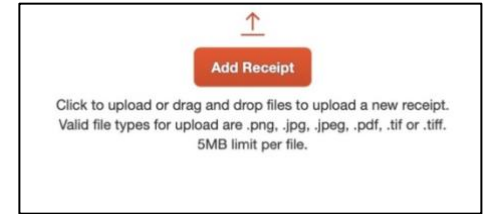
- The **Report Name** is required and should reflect the name of the meeting from the personalized email you received.
- The **Report Date** will default to the date that the report was created, please make this the final date of your travel.
- In the **Business Purpose** field, please state your role at the meeting: Board Member, Committee Member, Interviewee, Speaker, etc.
- The **Comment** field is for any comments related to the report as a whole; there will also be comment fields available for each individual expense.

A screenshot of the "Create New Report" form. The form has a title bar "Create New Report" with a close button (X). The form contains several fields: "Report Name" (required, marked with an asterisk), "Report Date" (pre-filled with "02/27/2023" and a calendar icon), and "Business Purpose" (marked with an asterisk and "Required field"). Below these is a "Comment" field. At the bottom right, there are "Cancel" and "Create Report" buttons.

## Entering Expenses

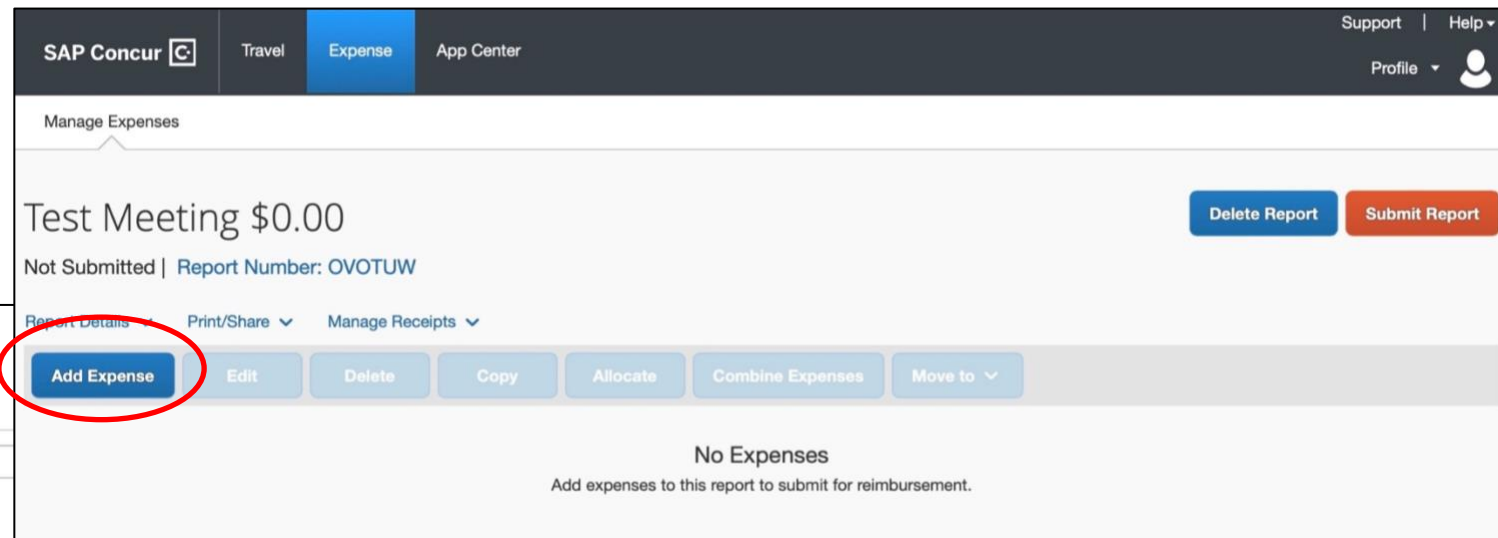
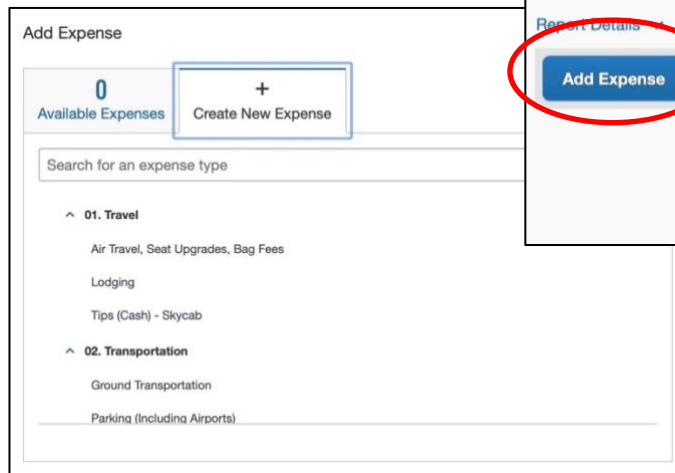
### NOTES THAT APPLY TO ALL EXPENSE TYPES:

- The report should only list expenses paid for by the individual. Do **NOT** include items paid for by BWF. Some examples of BWF-paid items are airfare booked and paid for through our travel agents, or charges at a hotel that are directly billed to BWF.
- Payment Type on all individual expense entries should be Traveler Paid. This will likely be the default and thus does not need to be changed.
- Currency: All reimbursements are made in US Dollars and the default currency when entering expenses will be US Dollars. However, there may be instances where an individual has receipts in other currencies. For example, a taxi ride in Toronto will likely be in Canadian Dollars. When entering that expense, the Amount should match the Canadian amount on the receipt and the currency field should be changed to "Canada, Dollar". Concur will handle the exchange rate to US Dollars based on the average exchange rate on the date of the transaction.
- Comment fields on individual expense entries are optional for sharing additional necessary information related to that expense.
- Receipts are added by clicking the "Add Receipt" button on each Expense entry, then follow the prompts to attach a copy of any receipts that apply to that expense.



To begin entering expenses, click on "Add Expense".

Scroll through the list that will open and select the related expense type for your first receipt.



## Air Travel Example

### Air Travel - Required Fields

- The **Transaction Date** will be the date the airfare purchase is made, not the travel dates.
- **Business Purpose** can be an abbreviated description such as “flight to BWF.”
- **Amount** is the amount you are asking to be reimbursed for this item and typically will match the amount on the receipt. (If there are travel agent fees on the receipt, those should be included in the total amount entered.)
- **BWF Tracked Mtg or Non-Mtg Specific** and **Focus Area** should match the code and meeting in the personalized email you received.

When complete, select either **Save Expense** or **Save and Add Another** if you have more expenses to enter.

The screenshot shows the 'New Expense' form in SAP Concur. The top navigation bar includes 'SAP Concur', 'Travel', 'Expense', and 'App Center'. The page title is 'Manage Expenses' and the main heading is 'New Expense'. There are two tabs: 'Details' (selected) and 'Itemizations'. The form is titled 'Allocate' and includes several required fields marked with an asterisk (\*):

- Expense Type**: A dropdown menu with 'Air Travel, Seat Upgrades, Bag Fees' selected.
- Transaction Date**: A date input field with a calendar icon, showing 'MM/DD/YYYY'.
- Business Purpose**: A text input field.
- Vendor**: A dropdown menu with 'Search for Vendor' selected.
- City**: A dropdown menu with a globe icon.
- Payment Type**: A dropdown menu with 'Traveler Paid' selected.
- Amount**: A text input field.
- Currency**: A dropdown menu with 'US, Dollar' selected.
- Ticket Number**: A text input field.
- BWF Tracked Mtg or Non-Mtg Specific**: A dropdown menu with '(20230216) Feb '23 Board Me...' selected.
- Focus Area**: A dropdown menu with '(11OP111X111BD002) Feb '2...' selected.

There is also a checkbox for 'Personal Expense (do not reimburse)'. At the bottom, there are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'.

## Meals/Food Example

### Meals/Food - Required Fields

- For any meals purchased, select **Meals/Food – Yourself Only** from the **Expense Type** menu.
- If the meal included additional individuals, the **Expense Type** should be **Meals/Food – Yourself and/or Others**. You will be prompted to enter the names of the other attendees included in the expense.
- The **Transaction Date** should match the date on the receipt.
- **Business Purpose** can be an abbreviated description such as “coffee at airport.”
- **Amount** is the total amount you are asking to be reimbursed for this item and typically will match the amount on the payment receipt.
- **BWF Tracked Mtg or Non-Mtg Specific** and **Focus Area** should match the code and meeting in the email you received.

Add Attendees

Attendees Recent Attendees Attendee Groups

Attendee Type\* Last Name First Name

Spouse/Companion

Attendee Title Company

Fewer Search Options Can't find an attendee? Create New Attendee

Search Reset Close

New Expense

Details Itemizations

Allocate

Expense Type\* Required field

Meals/Food - Yourself Only

Transaction Date\* Business Purpose\*

02/09/2023 coffee at airport

Vendor Description Payment Type\*

Traveler Paid

Amount\* Currency\*

3.75 US, Dollar

BWF Tracked Mtg or Non-Mtg Specific\* Focus Area\*

(20230216) Feb '23 Board Me... (110P111X111BD002) Feb '2...

Personal Expense (do not reimburse)

Comment

Save Expense Save and Add Another Cancel

**NOTE:** Meals often have two receipts. One receipt will have the itemization of what was purchased. This receipt is always required. A possible second receipt may reflect gratuity and the total amount paid. This should be included as well when the gratuity amount is not already reflected on the itemized receipt.

When complete, select either **Save Expense** or **Save and Add Another** if you have more expenses to enter.

## Lodging Example

### Lodging - Required Fields

- The **Transaction Date** should match the **Check-out Date**.
- **Business Purpose** can be an abbreviated description such as “hotel at XYZ mtg.”
- **Amount** is the total amount you are asking to be reimbursed for.
- **BWF Tracked Mtg or Non-Mtg Specific** and **Focus Area** should match the code and meeting in the email you received.
- The **Itemizations** tab is required for lodging. See the next page for details.

The screenshot shows the SAP Concur 'New Expense' form for Lodging. The interface includes a top navigation bar with 'SAP Concur', 'Travel', 'Expense', and 'App Center'. The main header is 'Manage Expenses' and the title is 'New Expense'. There are two tabs: 'Details' (selected) and 'Itemizations'. A blue 'Allocate' button is visible. The form contains several required fields marked with an asterisk (\*):

- Expense Type \***: A dropdown menu with 'Lodging' selected.
- Check-in Date \***: A date input field with a calendar icon.
- Check-out Date \***: A date input field with a calendar icon.
- Nights**: A numeric input field with the value '0'.
- Transaction Date \***: A date input field with a calendar icon.
- Business Purpose \***: A text input field.
- Vendor**: A dropdown menu with 'Search for Vendor' selected.
- Payment Type \***: A dropdown menu with 'Traveler Paid' selected.
- Amount \***: A numeric input field.
- Currency \***: A dropdown menu with 'US, Dollar' selected.
- BWF Tracked Mtg or Non-Mtg Specific \***: A dropdown menu with '(20230216) Feb '23 Board Me...' selected.
- Focus Area \***: A dropdown menu with '(11OP111X111BD002) Feb '2...' selected.

At the bottom, there is a 'Comment' text area and three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'.

## Hotel Itemizations –

- **Room Rate (per night)** and **Room Taxes** can be combined and entered as a nightly sum in the Room Rate field. Or you may list the taxes individually in the tax fields if you wish to have Concur do the math for you.
- Concur defaults to the option that the room rate is the same every night. If the rate is not the same each night, simply click on **Not the Same** before entering the amounts.
- Non-lodging charges on the hotel bill should be identified as such. The most common examples are parking and meals.
- The **Transaction Date** should match the date of that item on the itemized hotel bill.
- In some instances, the charge is recurring every night. Parking is the most common example of this. There is a checkbox to streamline that entry.
- Verify the **BWF Tracked Mtg or Non-Mtg Specific** field as well as the **Focus Area** field are still accurate.
- Click **Save Itemization** after each Expense Type has been entered to continue to the next.
- Charges not covered by BWF should be itemized as well. Check the **Personal Expense (do not reimburse)** checkbox on those items. An example of an item not covered by BWF is a souvenir purchase from a hotel gift shop. The **Expense Type** for personal items can be **Other T&E**.

The image displays two screenshots of the Concur hotel itemization interface. Both screenshots show a total amount of \$765.43 for Lodging on 02/09/2023. The left screenshot shows the 'Itemizations' tab with a summary table and a 'New Itemization' form. The right screenshot shows the 'New Itemization' form with various fields filled out, including 'Expense Type' set to 'Meals/Food - Yourself Only' and 'Personal Expense (do not reimburse)' checked. Red circles highlight the 'Itemizations' tab and the 'Expense Type' dropdown in both screenshots.

**Left Screenshot: Summary and New Itemization Form**

Amount	Itemized	Remaining
\$765.43	\$0.00	\$765.43

**New Itemization Form:**

- Expense Type: Lodging
- Entry Type: Recurring Itemization
- Period: 02/06/2023 - 02/09/2023 (Nights: 3)
- Your hotel room rate was: **The Same Every Night** (selected) / Not the Same
- Room Rate (per night): [ ]
- Room Tax (per night): [ ]
- Tax 2 (per night): [ ]
- Tax 3 (per night): [ ]

**Right Screenshot: Detailed New Itemization Form**

- Expense Type: **Meals/Food - Yourself Only** (selected)
- Recurring Every Night:
- Transaction Date: 02/08/2023
- Business Purpose: hotel test
- Amount: 25.00
- Currency: US, Dollar
- BWF Tracked Mtg or Non-Mtg Specific: (20230216) Feb '23 Board Me...
- Focus Area: (11OP111X111BD002) Feb '2...
- Personal Expense (do not reimburse):

When complete, select either **Save Expense** or **Save and Add Another** if you have more expenses to enter.

## Personal Car Mileage

For convenience or economy, individuals may occasionally use their own cars when traveling. Such usage is reimbursed at the standard IRS mileage rate. To enter mileage, select **Add Expense** and select **Personal Car Mileage**. Concur will bring up a map with fields to enter details.

Mileage Calculator

Avoid Tolls  Avoid Highways

Waypoints

A

B

**Calculate Route**

Deduct Commute

TOTAL PERSONAL **0.0 MI**

TOTAL BUSINESS **0.0 MI**

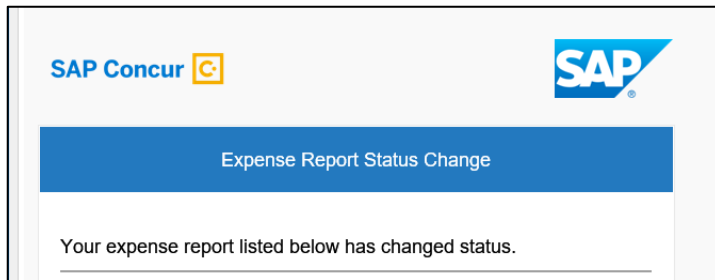
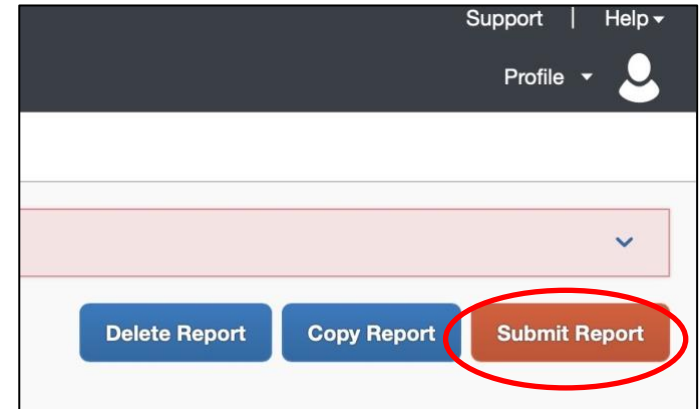
**Add Mileage to Expense** Cancel

- Enter your starting point in **Waypoint A** and your destination in **Waypoint B**.
  - **NOTE:** The address for **BWF's office** is 21 T.W. Alexander Drive, RTP, NC 27709.
- Click on **Calculate Route** and Concur will calculate the distance. In some cases, Concur may list multiple Suggested routes. Select the one that most closely matches what you drove.
- Only click on **Make Round Trip** if the return happened on the same date. Return drives on different days should be entered as a separate expense reflecting the respective date the drive happened.
- **Deduct Commute** checkbox only applies to Staff and may be left unchecked.
- Click on **Add Mileage to Expense**
- On the subsequent screen, adjust the **Transaction Date** to reflect the actual date for the drive. Also confirm the **Meeting Code** and **Focus Area** are still showing the correct information based on your personalized email.
- When complete, select either **Save Expense** or **Save and Add Another** if you have more expenses to enter.

### Submitting A Report

When you are confident that you have entered **all** expenses and are ready to submit the report, click the submit button in the top right corner of the report.

- Once the report is submitted you should receive email updates as the report goes through the BWF review, approval, and payment steps. You can also log in to view the status of your report.
- **IMPORTANT:** Sometimes we may need additional information. This will be communicated in the status change emails.
- Once the report has changed to a status of **Paid**, please allow **5 banking days** for the funds to appear in your account.



Questions or comments regarding this guide? Please contact: [accounting@bwfund.org](mailto:accounting@bwfund.org)