SAP Concur eExpenses
PA and EA webinar
November 2020

The webinar will start shortly - please switch off your camera and microphone
Housekeeping

• Please like the intro in the Chat so we know who has attended

• Please use Chat to ask questions and we will try to answer these at the end

• But if you have a question during the demo put your hand up

• Any questions we do not have time to cover, we will address afterwards via this meeting chat
Agenda

• Overview
• What will change
• Delegation
• Setting up eExpenses
• Approvals
• Benefits
• Where to get help and support
• Demonstration of the system
Overview

• Online SAP Concur eExpenses system being introduced in two waves in February and March 2021, replacing current paper form

• Will be used by all staff and students with SSO user ID claiming expenses from academic divisions, GLAM, UAS, Continuing Education and three colleges (Kellogg, Reuben, St Cross)

• Exceptions are:
  • Claims over £10,000
  • Claims related to advance payments
  • Some items that constitute a taxable benefit
  • Claims from people external to University (for example, visitors, research participants, interview candidates)
What will change?

• Claims will be created and processed online within eExpenses

• Receipts will be photographed and uploaded to eExpenses directly or via email or scanning

• Claims can created and submitted via mobile app
Delegation

• An individual can delegate creation and completion of their expense claim, but they have to **submit it themselves** because this ‘forms a declaration on the system that the expenses they are claiming have been incurred for carrying out University business and that they are in line with the University's expenses principles (PDF)’

• If you are preparing an expense claim on behalf of someone else, they can help you by uploading images of receipts as they go
Activities your manager cannot delegate

• Setting up and editing their personal profile within eExpenses including bank account details

• Final checking and submitting of their expense claims
Setting up eExpenses

Before creating a claim, individual claimants need to:

• Complete their profile within eExpenses including:
  • Bank account details
  • Verify email address(es)
  • Car details, if need to claim mileage
  • Set up a delegate

Editing profile:

• Cannot be delegated
• Must be completed on web browser, not mobile app
• Only needs doing once, unless details change
Approvals

• Approvals hierarchy is set up within eExpenses, so claims move through the approvals workflow online

• A claimant, or their delegate, can see what stage a claim has reached in the approvals process within eExpenses
Benefits of eExpenses

• Simpler claim completion
• Fewer errors
• Less paperwork
• In-system alerts remind you what you need to include
• Visibility of claim progress through eExpenses system
• Quicker remuneration
Where to get help and support

• Introductory video
• Finance website (https://finance.admin.ox.ac.uk/eexpenses)
• Quick Reference Guides
• Online self-learning training modules
• How to videos
• SAP Concur 24/7 support
Training & support: online modular training courses
Training & support: How to videos

**Claimants**
1. Upload receipts using the web app
2. Allocate costs
3. Claims with exceptions
4. Create a claim header
5. Create a claim with attendees
6. Create a claim with receipts
7. Create a claim without receipts
8. Create a mileage claim
9. Itemising a receipt
10. Access the system as a delegate
11. Add a vehicle
12. Add a delegate
13. Add an email address
14. Add bank details
15. Add favourite attendees
16. Create an expense line using the mobile app
17. Upload receipts using the mobile app

**Approvers**
1. Add a delegate
2. Approve a claim using the mobile app
3. Authorised approvals
4. Budget-holder approvals
5. Check allocations
6. Check itemisations
7. Forward a claim to another approver
8. Managing exceptions
Further information

https://finance.admin.ox.ac.uk/eexpenses

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