



UNIVERSITY OF  
OXFORD

# 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 be 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

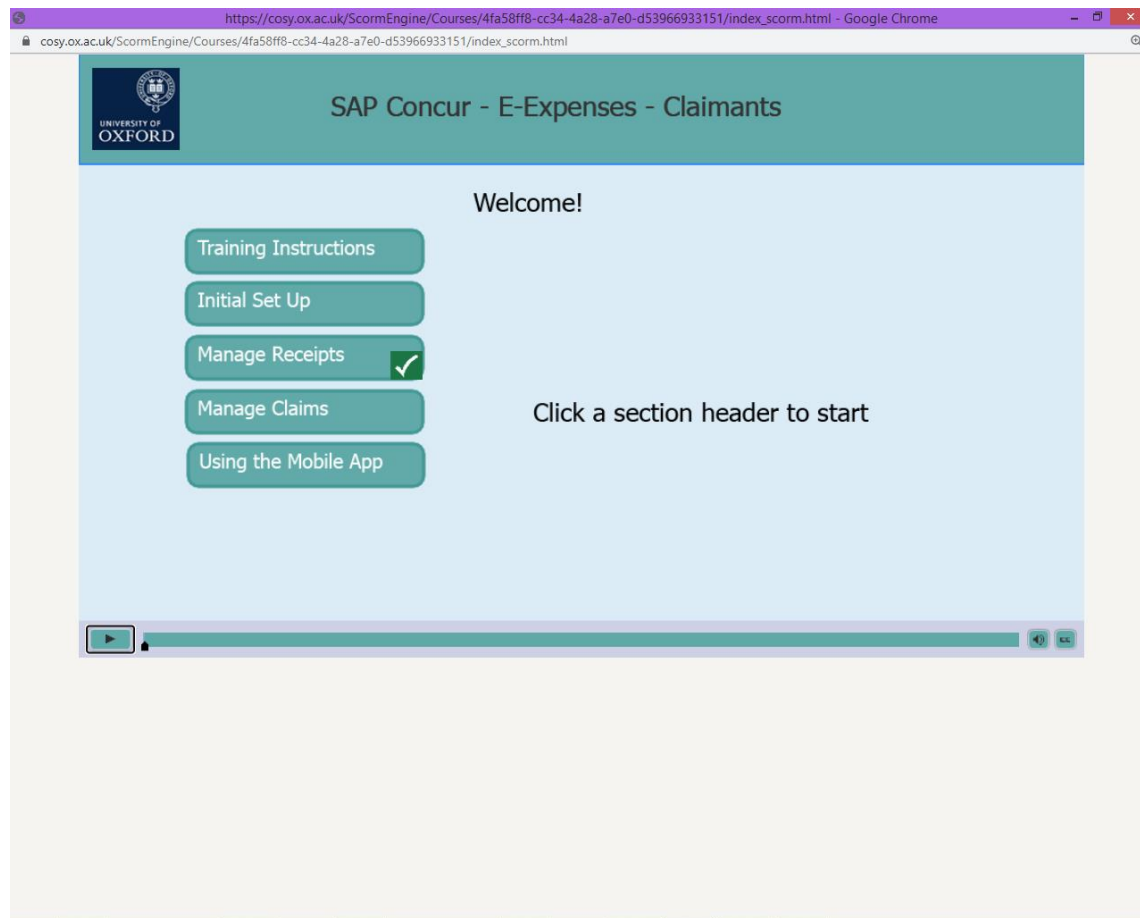


# Where to get help and support

- 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



https://cosy.ox.ac.uk/ScormEngine/Courses/4fa58ff8-cc34-4a28-a7e0-d53966933151/index\_scorm.html - Google Chrome

cosy.ox.ac.uk/ScormEngine/Courses/4fa58ff8-cc34-4a28-a7e0-d53966933151/index\_scorm.html

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## SAP Concur - E-Expenses - Claimants

Welcome!

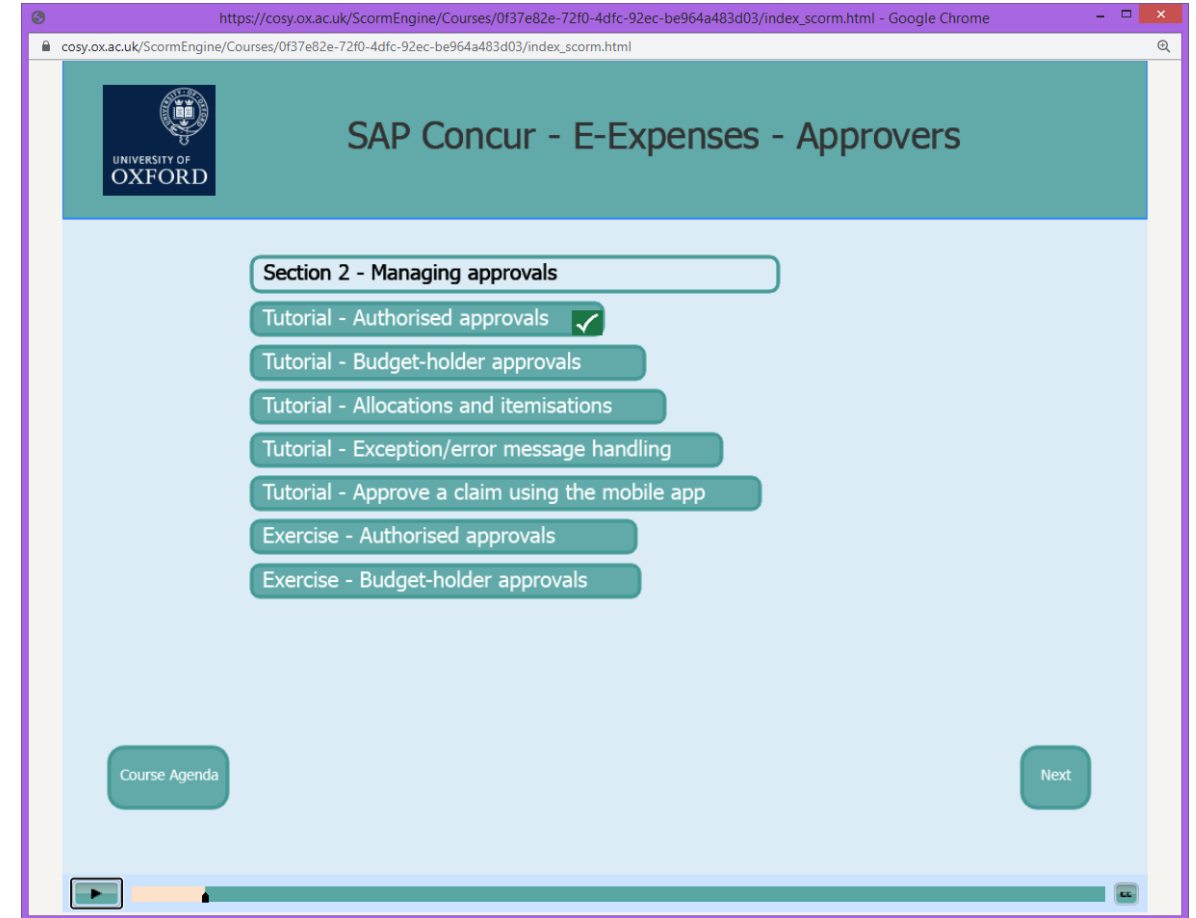
- Training Instructions
- Initial Set Up
- Manage Receipts ✓
- Manage Claims
- Using the Mobile App

Click a section header to start

Course Agenda

Next

This screenshot shows the start page of a training module for SAP Concur E-Expenses Claimants. It features a teal header with the University of Oxford logo and the course title. Below the header, a 'Welcome!' message is followed by a list of five menu items: 'Training Instructions', 'Initial Set Up', 'Manage Receipts' (which is highlighted with a green checkmark), 'Manage Claims', and 'Using the Mobile App'. A central instruction reads 'Click a section header to start'. At the bottom, there is a 'Course Agenda' button and a 'Next' button. A video player interface is visible at the very bottom of the page.



https://cosy.ox.ac.uk/ScormEngine/Courses/0f37e82e-72f0-4dfc-92ec-be964a483d03/index\_scorm.html - Google Chrome

cosy.ox.ac.uk/ScormEngine/Courses/0f37e82e-72f0-4dfc-92ec-be964a483d03/index\_scorm.html

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## SAP Concur - E-Expenses - Approvers

### Section 2 - Managing approvals

- Tutorial - Authorised approvals ✓
- Tutorial - Budget-holder approvals
- Tutorial - Allocations and itemisations
- Tutorial - Exception/error message handling
- Tutorial - Approve a claim using the mobile app
- Exercise - Authorised approvals
- Exercise - Budget-holder approvals

Course Agenda

Next

This screenshot shows a specific section of the training module for SAP Concur E-Expenses Approvers. The header includes the University of Oxford logo and the course title. The main content area is titled 'Section 2 - Managing approvals' and contains a list of seven items: 'Tutorial - Authorised approvals' (with a green checkmark), 'Tutorial - Budget-holder approvals', 'Tutorial - Allocations and itemisations', 'Tutorial - Exception/error message handling', 'Tutorial - Approve a claim using the mobile app', 'Exercise - Authorised approvals', and 'Exercise - Budget-holder approvals'. At the bottom, there is a 'Course Agenda' button and a 'Next' button. A video player interface is visible at the very bottom of the page.



# 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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