



Procure-to-Pay

Finance Division

<https://procurement.gwu.edu/university-payables>

<https://procurement.gwu.edu/payables-frequently-asked-questions>

**Reference Guide for Non-PO Payment Request Policy**

Non-PO Payment policy is used for the activities that do not require the securing of a purchase order prior to the issuance of payment activity.

(Refer to Procurement website – <https://procurement.gwu.edu/competitive-exemptions-goods-and-services>)

If you are submitting a request as non-PO you must identify the specific exemption number from the aforementioned website.

In the ‘Comments (Message to AP)’ field you must indicate ‘Exempt # xx’. Failure to do so will result in the delay of payment processing as this is required in order for the payment process to proceed

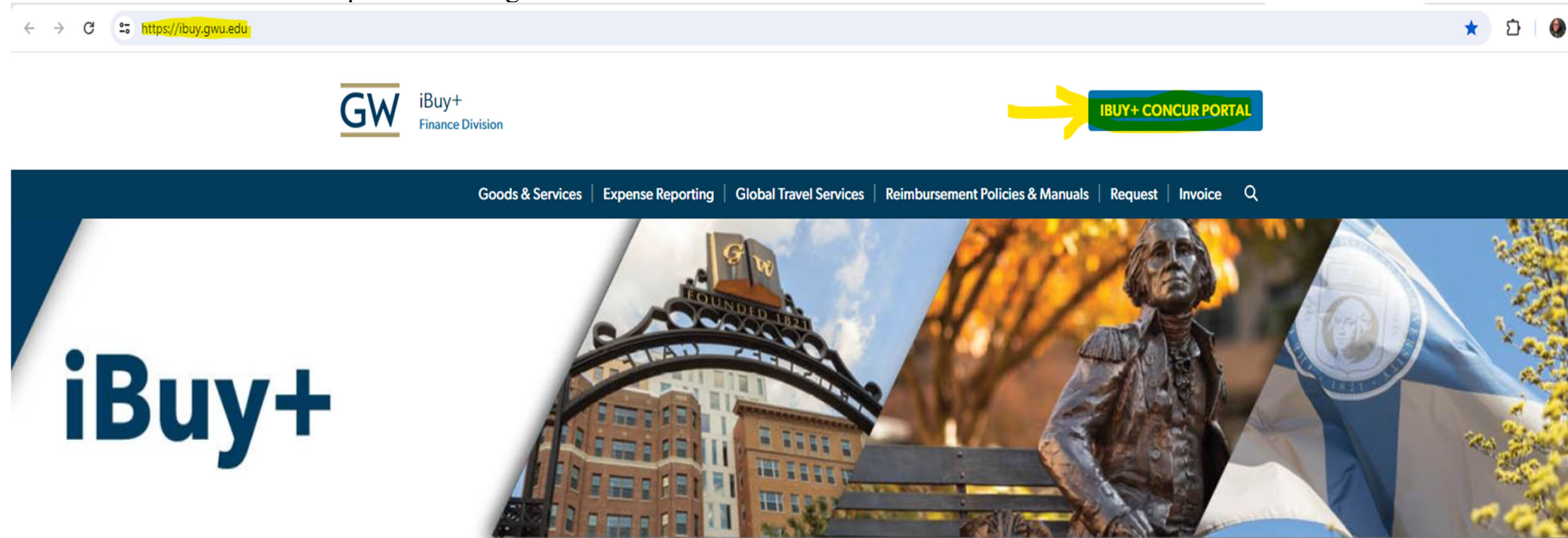
**Note:** Please verify that the appropriate option is selected in the ‘Invoice Form Type’ field to ensure the proper routing of the submission for invoice review and approval

Utilize the Non-PO Payment Request Policy for the following activity submissions:

1. Awards
2. Donations
3. Endowments
4. GCAS Refunds
5. Honorariums
6. Non-employee expense reimbursements
7. Non-PO commercial invoices
8. Other – Please identify
9. Petty Cash Replenishments
10. Prizes
11. Supplier Refunds

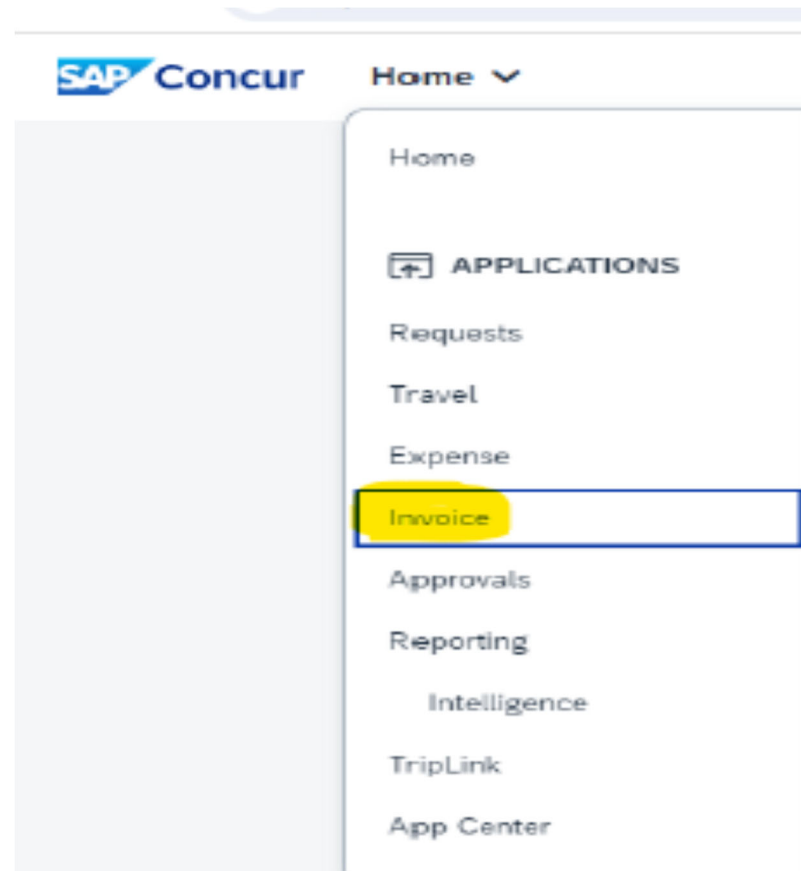
### Step 1

Log into the CONCUR application at <https://ibuy.gwu.edu> using your GWU system ID and password using Single sign-on. Then select the GW Invoice option on the right-hand side.



### Step 2

Select the 'Invoice' module



**Step 3**  
Click on 'Create New Invoice'

← → ↻ https://us2.concursolutions.com/Expense/Payables/CVP\_Portal.asp ☆ 📄 👤 ⋮

SAP Concur Invoice ▾ ? RW

Invoice Manager **Create New Invoice** Processor ▾ Invoice Capture Vendor Manager

## Create New Invoice

ⓘ Either choose Policy and select a Vendor from the vendor list, or find and select the purchase order for your invoice.

Policy: Non PO Payment Request Policy ▾ -OR- Purchase Order Search:

### Vendor List

Most Recently Used Search: Vendor Name ▾ Begins with ▾  Q Advanced

Vendor Name*	Vendor Site C...	Vendor Number	Address 1	Address 2	Address 3	City	State/Province	Postal/Zip Code	Country	Currency	Telephone Nu...	Vendor Code	Organization T...	W9 Received	W8 Received	W8 Expiration...	WCF Expiratio...
AINSLEY YOUNG	COLUMBUS-01	625472	1655 ANDOVE...			COLUMBUS	OH	43212	UNITED STATES	US, Dollar		625472	INDIVIDUAL	Yes	No		
ASIWITA TAN M...	SOMMERVILLE...	625431	21 WESTREET...			SOMMERVILLE	MA	02145	UNITED STATES	US, Dollar		625431	INDIVIDUAL	Yes	No		
DAVID A WEST...	LAWRENCE-01	625477	4516 WINGED ...			LAWRENCE	KS	66049	UNITED STATES	US, Dollar		625477	INDIVIDUAL		No		
ELIZABETH EC...	NEW YORK-04	112835	993 FIFTH AVE...	APT 16		NEW YORK	NY	10028	UNITED STATES	US, Dollar		112835	INDIVIDUAL	Yes	No		
GABRIEL PEN...	BEAVERTON-01	625478	13375 SOUTH...			BEAVERTON	OR	97005	UNITED STATES	US, Dollar		625478	INDIVIDUAL	Yes	No		
HOWL DEBRUYN	ADRIAN-01	625476	608 BUDLONG...			ADRIAN	MI	49221	UNITED STATES	US, Dollar		625476	INDIVIDUAL	Yes	No		
NEHA SHAH	BETHESDA-01	625474	4606 MORGAN...			BETHESDA	MD	20815	UNITED STATES	US, Dollar		625474	INDIVIDUAL		No		
PAIGE HERNA...	CAPITOLHEIG...	315806	7303 WILLOW ...			CAPITOL HEIG...	MD	20743	UNITED STATES	US, Dollar		315806	INDIVIDUAL	Yes			
TIMOTHY CRAIG	DULUTH-01	625471	2115 SUSSEX ...			DULUTH	MN	55803	UNITED STATES	US, Dollar		625471	INDIVIDUAL		No		
UNITED PARC...	PHILADELPHIA...	142858	PO BOX 7247-...			PHILADELPHIA	PA	19170-0001	UNITED STATES	US, Dollar		142858	CORPORATION	Yes	No		



## Step 4 Vendor Search

The screenshot shows the SAP Concur 'Create New Invoice' page. At the top, there are navigation tabs: 'Invoice Manager', 'Create New Invoice' (selected), 'Processor', 'Invoice Capture', and 'Vendor Manager'. Below the tabs, the main heading is 'Create New Invoice'. A callout bubble points to the 'Policy' dropdown menu, which is currently set to 'Non PO Payment Request Policy'. The text in the callout says 'Do Not Change The Policy'. Below the policy selection, there is a 'Purchase Order Search' field. Another callout bubble points to the 'Vendor List' section, which has a 'Most Recently Used' button. The text in this callout says 'Vendor list shows most recently used vendors for easy selection.' To the right of the 'Vendor List' section, there is a search bar with 'Search: Vendor Name' and a 'Begins with' dropdown. A third callout bubble points to this search bar, containing the text: 'Enter the vendor/supplier name, click the magnifying glass to perform the search. There are different ways to search, you can use, click the down caret symbol and enter the search information.' Below the search bar is a table of vendors.

Vendor Name	Vendor Site C...	Vendor Code	City	State/Province	Postal/Zip Code	Country	Currency	Telephone Nu...	Vendor Code	Organization T...	W9 Received	W8 Received	W8 Expiration...	WCF Expiratio...
AINSLEY YOUNG	COLUMBUS-01	625472	DOVE...	COLUMBUS	OH	43212	UNITED STATES	US, Dollar	625472	INDIVIDUAL	Yes	No		
ASWITA TAN M...	SOMMERVILLE...	625431	21 WESTREET...	SOMMERVILLE	MA	02145	UNITED STATES	US, Dollar	625431	INDIVIDUAL	Yes	No		
DAVID A WEST...	LAWRENCE-01	625477	4516 WINGED ...	LAWRENCE	KS	66049	UNITED STATES	US, Dollar	625477	INDIVIDUAL		No		
ELIZABETH EC...	NEW YORK-04	112835	993 FIFTH AVE... APT 16	NEW YORK	NY	10028	UNITED STATES	US, Dollar	112835	INDIVIDUAL	Yes	No		
GABRIEL PEN...	BEAVERTON-01	625478	13375 SOUTH...	BEAVERTON	OR	97005	UNITED STATES	US, Dollar	625478	INDIVIDUAL	Yes	No		
HOWL DEBRUYN	ADRIAN-01	625476	608 BUDLONG...	ADRIAN	MI	48221	UNITED STATES	US, Dollar	625476	INDIVIDUAL	Yes	No		
KAREN TONGS...	LOS ANGELES...	405329	1352 ALLESAN...	LOS ANGELES	CA	90026	UNITED STATES	US, Dollar	405329	INDIVIDUAL	Yes			
NEHA SHAH	BETHESDA-01	625474	4606 MORGAN...	BETHESDA	MD	20815	UNITED STATES	US, Dollar	625474	INDIVIDUAL		No		
PAIGE HERNA...	CAPITOLHEIG...	315806	7303 WILLOW ...	CAPITOL HEIG...	MD	20743	UNITED STATES	US, Dollar	315806	INDIVIDUAL	Yes			
TIMOTHY CRAIG	DULUTH-01	625471	2115 SUSSEX ...	DULUTH	MN	55803	UNITED STATES	US, Dollar	625471	INDIVIDUAL		No		

Advanced Search is also available to search the vendors. This permits search via various selected criteria.



**Step 5**  
Vendor Selection

SAP Concur Invoice ? U

Invoice Manager **Create New Invoice** Processor Invoice Capture Vendor Manager

## Create New Invoice

*Either choose Policy and select a Vendor from the vendor list, or find and select the purchase order for your invoice*

Policy: Non PO Payment Request Policy **OR** Purchase Order Search:

### Vendor List

**Most Recently Used** Search: Vendor Name ▼ Begins with ▼  X Q **Advanced**

Vendor Name <sup>1</sup>	Vendor Site C...	Vendor Number	Address 1	Address 2	Address 3	City	State/Province	Postal/Zip Code	Country	Currency	Telephone Nu...	Vendor Code	Organization T...	W9 Received	W8 Received	W8 Expiration..	WCF Expiratio...
UNITED PARC...	CARROLLTON...	142858	1620 VALWOO...	#115		CARROLLTON	TX	75006	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	HAGERSTOWN...	142858	PO BOX 4980			HAGERSTOWN	MD	21747-4980	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	LOUISVILLE-01	142858	UPS SUPPLY C...	ATTN: CUSTO...	PO BOX 34486	LOUISVILLE	KY	40232	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	PHILADELPHIA...	142858	PO BOX 7247...			PHILADELPHIA	PA	19170-0001	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	PHILADELPHIA...	142858	# 38 PO BOX 7...			PHILADELPHIA	PA	19170-0001	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	WASHINGTON...	142858	4125 ALBEMA...			WASHINGTON	DC	20016	UNITED STATES	USD		142858	CORPORATION	Yes	No		
UNITED PARC...	CHICAGO-02	142858	PO BOX 809488			CHICAGO	IL	60680	UNITED STATES	USD		142858	CORPORATION	Yes	No		

Select the correct Vendor/Supplier Name/Number and the **REMITTANCE** Address that is on the invoice.  
Double click to create your new invoice

**Step 6**  
Verify the correct vendor/supplier was selected.

SAP Concur Invoice

Invoice Manager **Create New Invoice** Processor Invoice Capture Vendor Manager

Create New Invoice for [Select Invoice Owner]

## Enter Invoice Details

Submit Invoice

Actions Details

**Vendor Information**

UNITED PARCEL SERVICE INC

1620 VALWOOD PKWY  
#115  
CARROLLTON, TX  
75006

Vendor Code: 142858  
Address Code: CARROLLTON-01

Currency: USD-US, Dollar

View **Change**

**Invoice Details**

Policy: Non PO Payment Request Policy

Invoice Name: [ ] Invoice Number: [ ] PO Number: [ ] Invoice Date: [ ] Currency: USD-US, Dollar Payment Method: CHECK

Total Invoice Amount (incl. S&T): 0.00 Request Total: 0.00

Are All Services Performed Outside the US?: [ ] Is 100% of the Payment for Services?: [ ] Service Period: [ ] Invoice Form Type: [ ] Invoice Type: Standard

Grant/Non Grant: (GL) Non-Grant Oracle Alias: (634003) PROCURE -TO- PAY

Comments (Message to AP): [ ] Payment Remittance Description (Visible to Vendors): [ ] W8 Received: No W8 Expiration Date: [ ] WCF Expiration Date: [ ]

Processing Type: Standard Net Payment Terms: 25 Payment Due Date: [ ] Mail Instructions: [ ] Special Handling Detail: [ ] Special Handling Code: [ ] Is Emergency Check Run: [ ]

Pay Group: Standard FD Group: AVP FOR FINANCE GWID: [ ] Income Tax Type: [ ] Invoice Withholding Tax Group: [ ] Payment Method Type: Client Payment Status: Not Paid

Payment Status Date: [ ] Payment Amount: [ ] Invoice Group ID: GW

**Save**

**Itemization Summary**

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
No items found.										

Verify the vendor information to ensure it matches the invoice and that you selected the correct one. You can click the change button to the right to reselect.

**Step 7**

Invoice Details – all fields with a red vertical line are mandatory and must be completed, field descriptions are below.

Create New Invoice for [Select Invoice Owner]

## Enter Invoice Details

Actions ▾ Details ▾

### Vendor Information

UNITED PARCEL SERVICE INC  
1620 VALWOOD PKWY  
#115  
CARROLLTON, TX  
75006  
Vendor Code: 142858  
Address Code: CARROLLTON-01  
Currency: USD-US, Dollar

View Change

### Invoice Details

Policy: Non PO Payment Request Policy

Invoice Name: [Mandatory]

Invoice Number: [Mandatory]

PO Number: [Mandatory]

Invoice Date: [Mandatory]

Currency: USD-US, Dollar

Payment Method: CHECK

Total Invoice Amount (Incl S&T): 0.00

Request Total: 0.00

Are All Services Performed Outside the US?: [Mandatory]

Is 100% of the Payment for Services?: [Mandatory]

Service Period: [Mandatory]

Invoice Form Type: [Mandatory]

Invoice Type: Standard

Grant/Non Grant: (GL) Non-Grant

Oracle Alias: (634003) PROCURE -TO- PAY

Comments (Message to AP): [Mandatory]

Payment Remittance Description (Visible to Vendors): [Mandatory]

W8 Received: No

W8 Expiration Date: [Mandatory]

WCF Expiration Date: [Mandatory]

Processing Type: Standard

Net Payment Terms: 25

Payment Due Date: [Mandatory]

Mail Instructions: [Mandatory]

Special Handling Detail: [Mandatory]

Special Handling Code: [Mandatory]

Is Emergency Check Run

Pay Group: Standard

FD Group: AVP FOR FINANCE

GWID: [Mandatory]

Income Tax Type: [Mandatory]

Invoice Withholding Tax Group: [Mandatory]

Payment Method Type: Client

Payment Status: Not Paid

Payment Status Date: [Mandatory]

Payment Amount: [Mandatory]

Invoice Group ID: GW

Save

### Itemization Summary

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
No items found.										



## Field Descriptions:

- **Invoice Name:** This is a free form text field; this is similar to what is used in Expense.  
Use a unique name for each submission, limit the number of characters used and no special characters.
- **Invoice Number:** Use the invoice number provided by the vendor/supplier or add the Payables recommended protocol when no invoice exists, it can be found [here](#).  
**Strictly adhere to the Payables invoice naming protocol, do not create your own, doing so will circumvent the duplicate invoice detection process.**
- **Invoice Date:** Enter the invoice date provided by the vendor/supplier, if no date is provided, use the current date.
- **Currency:** By default, US currency USD is populated. When the invoice is in another currency, select the currency from the LOV (list of values).
- **Total Invoice Amount (Incl S&T):** Enter the total amount of the invoice sent by the vendor/supplier.  
If sales taxes are included you need to check the [tax department website](#) for sales tax exemptions.
- **Are all Services Performed outside the USA?:** This is required for tax reporting and/or tax withholding.
- **Is 100% of the Payment for Services?** This is required for tax reporting and/or tax withholding, goods are not reportable/with holdable and services are subject.
- **Service Period:** This is a free form text field and **required** for all Grant/PTA related invoices.
- **Invoice Form Type:** select from the drop down the type of invoice you are processing.
- **Invoice Type:** Select the type of invoice either standard or credit.
- **Grant/Non Grant:** Select GL (Non Grant ) or PTA (Grant ) from the LOV (list of values).
- **Oracle Alias:** Select the GL/PTA accounts to where the invoice would be charged.
- **Comments (Message to AP):** All the comments and instructions that you need Accounts payables to follow and take action on the invoice has to be entered into this field.
- **Payment Remittance Description (Visible to Vendors):** This is sent with payment either printed on the check or sent with ACH, limit the number of characters used and no special characters.
- **Processing Type:** Standard is the default value.
  - Standard: An Invoice from a supplier representing an amount due for goods or services purchased or performed.
  - Credit memo: A memo from a supplier representing a credit amount towards goods or services.
  - For any emergency payments that need to be paid immediately. Enter your business justification notes in the Comments (Message to AP) field so Accounts Payables can treat this payment as priority.
- **Payment Method, Net Payment Terms, and Payment Due Date:** The payment details information are populated from the vendor/supplier record.
- **Mail Instructions:** Mail instructions are required for check instructions, depending on the priority of the check payments 'Mail Instructions' can be selected.  
The postage expenses for using the mail instructions would be charged to the dept. submitting the invoice.
- **Special Handling Detail:** This field can be used to enter any additional instructions regarding the payment (including details for 'HOLD For Pick Up').
- **Special Handling Code:** These values can be selected only for check payments.
- **Attachment required:** Checks will be delivered to the Accounts Payables address.
- **Hold For Pick up:** Checks will be delivered to the FSSC in Washington DC for pick up by the requester.
- **PO Number:** Enter a PO number if you think this invoice has to be associated with a PO.
- **FD Group:** FD group will default from the home org.  
If this is not the correct FD group you can choose the correct one to which you are charging to from the list of values and submit or assign the invoice for approval.

**Step 8**  
Invoice Details -continued:

Definition of each Invoice Form type listed in the LOV (List of Values)

- **Award:** Given in recognition of an outstanding achievement. Not applicable to employees. For more on this topic visit [here](#).
- **Donations:** Used to capture the donations to charitable organizations by the University.
- **Fellowships:** Submit/create a request with adequate supporting documentation through, For more on this topic visit [here](#).
- **GCAS Refunds:** request for GCAS only
- **Honorarium:** An honorarium is a one-time payment of a nominal amount that may, at the discretion of the university, be made to an individual, (who is not an employee or a student of the University).  
For more on this topic visit [here](#).
- **Material & Service PO Invoices:** A bill issued by a supplier/vendor who rendered a good or service to the University. It is supported by a purchase order.
- **Non-Employee Expense Reimbursement:** Reimbursement for persons not an GWU/MFA Employee or GWU/MFA Student. For more on this topic visit [here](#).
- **Non-PO invoice:** An invoice issued by a supplier/vendor who rendered a good or service to the University that does not require a purchase order.  
For more on this topic visit (GWU) [here](#) and (MFA) [here](#).
- **Others-Identify:** If you don't see the form type from the list of values, use the form type as 'Others-Identify' and enter the invoice type in Comments (Message to AP) Column.
- **Payroll- For Payroll Use Only:** request for Payroll use only.
- **Prize:** Given as a reward to the winner of a competition or in recognition of an outstanding achievement. Not applicable to employees. For more on this topic visit [here](#).
- **Stipend - Non GWU Student, Scholarships, and Fellowships** Submit/create a request with adequate supporting documentation. For more on this topic visit [here](#).

Create New Invoice for [Select Invoice Owner]

## Enter Invoice Details

Save

Actions Details

### Vendor Information

UNITED PARCEL SERVICE INC  
1420 VILWOOD PKWY  
4115  
CARROLLTON TX  
75006  
Vendor Code: 242858  
Address Code: CARROLLTON-11  
Currency: USD-US, Dollar

View Change Save

### Invoice Details

Policy Not PO Payment Request Policy	Invoice Name	Invoice Number	PO Number	Invoice Date	Currency USD-US, Dollar	Payment Method CHECK
Total Invoice Amount (incl. S&T) 0.00	Request Total 0.00	Are All Services Performed Outside the US?	Is 100% of the Payment for Services?	Service Period	Invoice Form Type	Invoice Type Standard
Grant/Non Grant (GL) Non Grant	Order Ref. (03400) PROCURE TO PA	Comments (Message to AP)	Payment Remittance Description (Visible to Vendor)	Will Received No	Will Expiration Date	Will Expiration Date
Processing Type Standard	Net Payment Terms 25	Payment Due Date	Mail Instructions	Special Handling Detail	Special Handling Code	<input type="checkbox"/> Is Emergency Check Run
Pay Group Standard	PO Group A/P FOR FINANCE	GWO	Income Tax Type	Invoice Withholding Tax Group	Payment Method Type Client	Payment Status Not Paid
Payment Status Date	Payment Amount	Invoice Group ID G01				



### Itemization Summary

Tab |  Show Distributions | Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Desc	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
No items found.										



## Step 9

Itemization details:

Populate all mandatory fields (denoted by the red asterisk\*) and any desired optional fields and click save in the bottom right.

Amount Remaining to be Itemized: \$1.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment E...	Expenditure It...	Unit Price	Total	Tax
1	55121	55121-LECTURERS	1					\$0.00	\$0.00	\$0.00

**Add Item**

No.	Expense Type	* Line Description	Quantity	Type of Activity	Region	Prepayment E...	Expenditure It...	* Unit Price	Total	Tax
1	55121	55121-LECTURERS	1					\$0.00	\$0.00	\$0.00

Field Descriptions:

- **Expense Type:** Search for the 'Expense Type' or enter the five-digit expense.
- **Line Description:** Enter your 'Line Description' (payment purpose; this may be identical to the 'Payment Remittance Description' indicated on the 'Enter Invoice Details' screen.  
Refer to step 7, Field (Payment Remittance). limit the number of characters used and no special characters.
- **Quantity:** The 'Quantity' value defaults to the number "1". You may leave the default value or change if appropriate.
- **Type Of Activity:** If a non-domestic expense type is indicated, then select the Type of Activity from the list of values
- **Regions:** If a non-domestic expense type is indicated, then select the Regions from the list of values
- **Prepayment End date:** If the Invoice type is selected as "Prepayment" on the invoice header then the Prepayment end date has to be populated for all the invoice lines
- **Expenditure Item date:** If a Grant or PTA award is involved, then the 'Expenditure Item Date' field must be populated by entering the date (either via manual entry or by selecting the calendar "dropdown").
- **Unit Price:** Enter the unit price which is the lime amount that you are allocating.
- **Total:** The 'Total' field will automatically calculate based on your entries in the 'Quantity' and 'Unit Price' fields.

After you click on Save, it will take you back to the Invoice page.

**NOTE:** If an additional line item is to be processed (due to multiple organizations or expense types being involved in the payment), click 'Add Item' and repeat step 7.

# Step 10

Allocation:

Select the line (do this for all lines entered) click the edit button.

https://us2.concursolutions.com/Expense/Payables/CVP\_Portal.asp

SAP Concur Invoice

Invoice Manager Create New Invoice Processor Invoice Capture Vendor Manager

Invoice for [Select Invoice Owner] **example** Status: Not Submitted Assign Submit Invoice

Actions Details View Invoice

**Vendor Information**

UNITED PARCEL SERVICE INC

PO BOX 7247-0244

PHILADELPHIA, PA 19170-0001

Vendor Code: 142858  
Address Code: PHILADELPHIA-01

Currency: USD-US, Dollar

View Change Save

**Invoice Details**

Policy: Non PO Payment Request Policy

Invoice Name: example Invoice Number: example PO Number: Invoice Date: 04/19/2024 Currency: USD-US, Dollar Payment Method: CHECK

Total Invoice Amount (incl S&T): 1.00 Request Total: 1.00 Are All Services Performed Outside the US?: NA Is 100% of the Payment for Services?: Yes Service Period: Invoice Form Type: Honorarium Invoice Type: Standard

Grant/Non Grant: (GL) Non-Grant Oracle Alias: (634003) PROCURE -TO- PAY Comments (Message to AP): Payment Remittance Description (Visible to Vendors): W8 Received: No W8 Expiration Date: WCF Expiration Date:

Processing Type: Standard Net Payment Terms: 25 Payment Due Date: 05/14/2024 Mail Instructions: Special Handling Detail: Special Handling Code: Is Emergency Check Run:

Pay Group: Standard FD Group: AVP FOR FINANCE GWID: Income Tax Type: Invoice Withholding Tax Group: Line Item Tax Amount: 0.00 Payment Method Type: Client

Payment Status: Not Paid Payment Status Date: Payment Amount: Invoice Group ID: GW

Save

**Itemization Summary** | Amount Remaining to be Itemized: \$0.00

Add Item Delete Item Edit Distribute Show Distributions

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	55121-LECTURERS	example	1					\$1.00	\$1.00	\$0.00
Account Code		Distribution Code	Percentage		Net Amount		Gross Amount			
55121 [System Default]		GL-634003	100		\$1.00		\$1.00			

Click Distribute by in the middle left of the screen, click the down caret and select Percentage and then click the Add button.

### EDIT LINE ITEM

Expense Type: SS121-LECTURERS | Line Description: example | Quantity: 1 | Type of Activity: | Region: | Prepayment End Date: | Expenditure Item Date: | Unit Price: 1.00 | Total: 1.00

Tax: 0.00

[View Invoice](#)

Distributions | Distribution Summary

**Distributions** Total: \$1.00 | Distributed: \$0.00 (0%) | Remaining: \$1.00 (100%)

**Distribute By** | **Add** | Delete | Favorites | Add to Favorites

Percentage | Grant/Non G... | \* Oracle Alias | Distribution Code

There should always be the number 100 under the distribution section, click save in the bottom right.

**Note:** The system will default to an allocation of 100%. In this instance as there is only one distribution and we shall 'Save' the input.

If there were additional distributions, you would select the 'Add' option to add an additional line or lines as needed and then change the corresponding percentage amount until all lines equal 100 percent.

EDIT LINE ITEM ×

Expense Type: SS121-LECTURERS | Line Description: example | Quantity: 1 | Type of Activity: | Region: | Prepayment End Date: | Expenditure Item Date: | Unit Price: 1.00 | Total: 1.00

Tax: 0.00

[View Invoice](#)

Distributions | Distribution Summary

**Distributions** Total: \$1.00 | Distributed: \$1.00 (100%) | Remaining: \$0.00 (0%)

**Distribute By** | **Add** | Delete | Favorites | Add to Favorites

Percentage | \* Grant/Non G... | \* Oracle Alias | Distribution Code

100 | (GL) Non-Grant | (634003) PR... | GL-634003



Cancel Save



### Step 11

Upload your invoice - Your invoice followed by all supporting documentation must be submitted as one single pdf file. Click Actions, upload image, browse (find where you saved it), select, upload, file MUST be png, jpg, pdf or tif

Invoice for [Select Invoice Owner]  
**example**

Actions ▾ Details ▾

- Unassign
- Upload Image**
- Delete Image
- View Payment Image
- Review Required
- Remove From Review
- Delete Invoice
- Print ▶
- Extend Due Date ▶
- Change Policy ▶
- Create Recurring Invoice

### Invoice Details

Policy	Non PO Payment Request Policy ▾	Invoice Name	example	Invoice Number	example
Total Invoice Amount (incl S&T)	1.00	Request Total	1.00	Are All Services Performed Outside the US?	NA
Grant/Non Grant	(GL) Non-Grant ▾	Oracle Alias	(634003) PROCURE -TO- PAY ▾	Comments (M)	
Processing Type <sup>?</sup>	Standard ▾	Net Payment Terms	25	Payment Due	05/14/2024
Pay Group	Standard ▾	FD Group	AVP FOR FINANCE ▾	GWID	

Invoice for [Select Invoice Owner]  
**example**

Actions ▾ Details ▾

### Vendor Information

UNITED PARCEL SERVICE INC  
PO BOX 7247-0244  
PHILADELPHIA, PA 19170-0001  
Vendor Code: 142858  
Address Code: PHILADELPHIA-01  
Currency: USD-US, Dollar

### Invoice Details

Policy	Non PO Payment Request Policy ▾	Invoice Name	example	Invoice Number <sup>?</sup>	example	PO Number		Invoice Date	04/19/2024
Total Invoice Amount (incl S&T)	1.00	Request Total	1.00	Are All Services Performed Outside the US?		Is 100% of the Payment for Services?		Service Period	
Grant/Non Grant	(GL) Non-Grant ▾	Oracle Alias	(634003) PROCURE -TO- PAY ▾						
Processing Type <sup>?</sup>	Standard ▾	Net Payment Terms	25						
Pay Group	Standard ▾	FD Group	AVP FOR FINANCE ▾						
Payment Status	Not Paid	Payment Status Date							

View Change Save

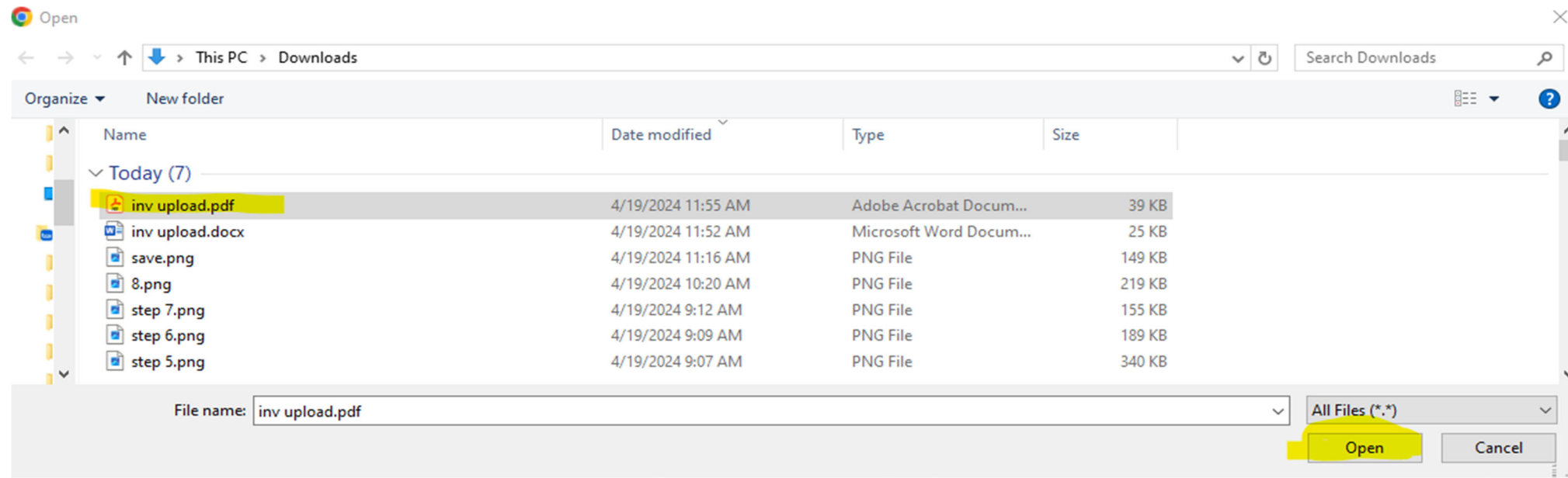
#### Upload Image

For best results, scan images in black & white with a resolution of 300 DPI or lower. Click **Browse** and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 10 MB limit per file.

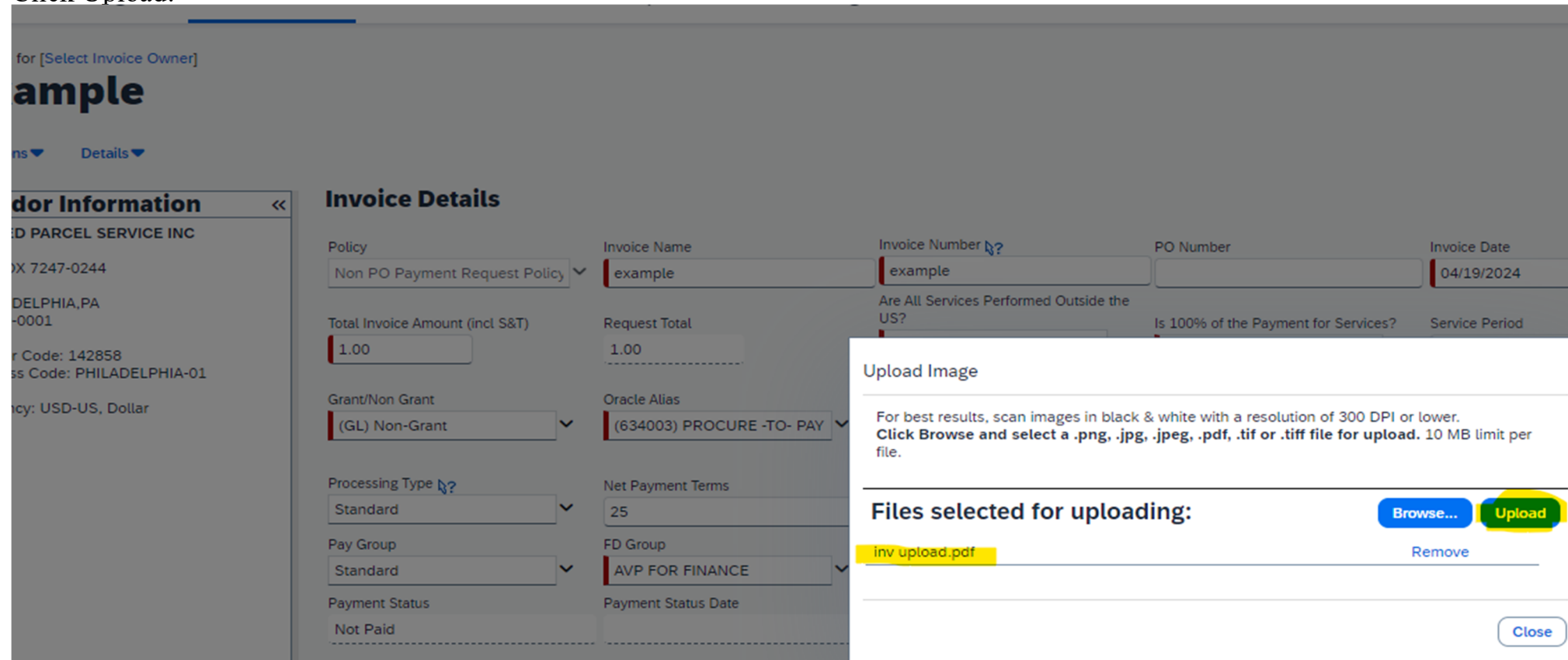
**Files selected for uploading:** Browse... Upload

No files selected

Close



Click Upload:



You will see it has been uploaded, click close:

The screenshot shows the SAP Concur 'Create New Invoice' page. The 'Vendor Information' panel on the left lists 'UNITED PARCEL SERVICE INC' with address 'PHILADELPHIA, PA 19170-0001' and currency 'USD-US, Dollar'. The 'Invoice Details' panel contains various fields: Policy (Non PO Payment Request Policy), Invoice Name (example), Invoice Number (example), PO Number, Invoice Date (04/19/2024), Total Invoice Amount (1.00), Request Total (1.00), Grant/Non Grant ((GL) Non-Grant), Oracle Alias ((634003) PROCURE -TO- PAY), Processing Type (Standard), Net Payment Terms (25), Pay Group (Standard), FD Group (AVP FOR FINANCE), and Payment Status (Not Paid). An 'Upload Image' dialog box is overlaid on the right, showing 'inv upload.pdf' as a file selected for uploading. The dialog includes instructions for file format and size, and buttons for 'Browse...', 'Upload', and 'Close'.

View the invoice to make sure the correct attachement was selected for upload:

This screenshot shows the same SAP Concur 'Create New Invoice' page, but with the 'Upload Image' dialog closed. The 'Invoice Details' panel now includes additional fields: 'Are All Services Performed Outside the US?' (NA), 'Is 100% of the Payment for Services?' (Yes), 'Service Period', 'Invoice Form Type' (Honorarium), 'Invoice Type' (Standard), 'Payment Remittance Description', 'W8 Received' (No), 'W8 Expiration Date', 'WCF Expiration Date', 'Mail Instructions', 'Special Handling Detail', 'Special Handling Code', 'Invoice Withholding Tax Group', 'Line Item Tax Amount' (0.00), 'Payment Due Date' (05/14/2024), 'GWID', 'Income Tax Type', and 'Payment Method Type' (Client). A large yellow arrow with a blue outline points to the 'View Invoice' button located on the right side of the page. The status 'Not Submitted' is visible in the top right corner.

Invoice will open in new window:

SAP Concur Invoice ▾ ? RW

Invoice Manager **Create New Invoice** Processor ▾ Invoice Capture Vendor Manager

Invoice for [Select Invoice Owner] Status: Not Submitted

**example** Assign Submit Invoice

Actions ▾ Details ▾


**Vendor Information** << **Invoice Details** View Invoice

UNITED PARCEL SERVICE INC

Concur - Travel and Expense - Google Chrome  
https://us2.concursolutions.com/Expense/Payables/view\_invoice\_image.asp?imagePanelId=ext-comp-1302&url=https%3A%2F%2Fwww-us2.api.concursolutions.com%2Fimaging%2Fwe...

**Invoice Image**

C123E90FB3AEDD21CC80CF1872E4EC2F3F796889F36857... 1 / 1 | - 69% + | [Download] [Share]



Amount Remaining to be Itemized: \$0.00

Rate	Expenditure Item Date	Unit Price	Total	Tax
		\$1.00	\$1.00	\$0.00



## Step 12

Submit your request for management approval by selecting the 'Submit Request' option.  
Click submit in the upper right side:

← → ↻ https://us2.concursolutions.com/Expense/Payables/CVP\_Portal.asp

SAP Concur Invoice ▾

Invoice Manager Create New Invoice Processor ▾ Invoice Capture Vendor Manager

Invoice for [Select Invoice Owner]  
**example**

Status: Not Submitted  
Assign Submit Invoice

Actions ▾ Details ▾

### Vendor Information

UNITED PARCEL SERVICE INC  
PO BOX 7247-0244  
PHILADELPHIA, PA 19170-0001  
Vendor Code: 142858  
Address Code: PHILADELPHIA-01  
Currency: USD-US, Dollar

View Change Save

### Invoice Details

Policy	Invoice Name	Invoice Number	PO Number	Invoice Date	Currency	Payment Method
Non PO Payment Request Policy	example	example		04/19/2024	USD-US, Dollar	CHECK
Total Invoice Amount (incl S&T)	Request Total	Are All Services Performed Outside the US?	Is 100% of the Payment for Services?	Service Period	Invoice Form Type	Invoice Type
1.00	1.00	NA	Yes		Honorarium	Standard
Grants/Non Grant	Oracle Alias	Comments (Message to AP)	Payment Remittance Description (Visible to Vendors)	W8 Received	W8 Expiration Date	WCF Expiration Date
(GL) Non-Grant	(634003) PROCURE -TO- PAY			No		
Processing Type	Net Payment Terms	Payment Due Date	Mail Instructions	Special Handling Detail	Special Handling Code	<input type="checkbox"/> Is Emergency Check Run
Standard	25	05/14/2024				
Pay Group	FD Group	GWID	Income Tax Type	Invoice Withholding Tax Group	Line Item Tax Amount	Payment Method Type
Standard	AVP FOR FINANCE				0.00	Client
Payment Status	Payment Status Date	Payment Amount	Invoice Group ID			
Not Paid			GW			

Save

### Itemization Summary

Add Item Delete Item Edit Distribute ▾  Show Distributions | Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Quantity	Type of Activity	Region	Prepayment End Date	Expenditure Item Date	Unit Price	Total	Tax
1	55121-LECTURERS	example	1					\$1.00	\$1.00	\$0.00
Account Code		Distribution Code	Percentage			Net Amount	Gross Amount			
55121 [System Default]		GL-634003	100			\$1.00	\$1.00			

← Back to List

Select the individual who is responsible for approving this invoice transaction.

This individual should be someone higher in your organizational hierarchy or the individual authorizing the charges if the charges are being posted external to your organization.

Then click submit Invoice.

The screenshot displays an invoice management interface. On the left, the 'Vendor Information' for 'UNITED PARCEL SERVICE INC' is visible, including address and currency details. The 'Invoice Details' section shows a 'Non PO Payment Request Policy' for an invoice named 'example' with a total amount of 1.00. A modal window titled 'Approval Flow for Invoice: example' is open, displaying a red error message: 'You must identify an approver before the invoice proceeds to the next workflow step.' Below the message, there are two sections for adding approvers. The first section, 'Invoice Approver:', has a search dropdown with 'Shearer, Shelley L. (shellshearer@gwu.edu)' selected and a blue plus icon. The second section, 'Back Office Approval:', has an empty search dropdown and two blue plus icons. At the bottom of the modal, there is a green 'Submit Invoice' button, a blue 'Save Workflow' button, and a 'Cancel' link. The background interface also shows an 'Exceptions' section with a warning for 'Line Item 1 Line Items must be fully allocated' and an 'Itemization Summary' section with buttons for 'Add Item', 'Delete Item', 'Edit', and 'Distribute'.

Any additional questions, you can email [p2p@gwu.edu](mailto:p2p@gwu.edu)