



FINANCE AND OPERATIONS
Finance and Budget

Concur

Travel and Expense Management



Quick Start Mini Guidebook

October 19, 2021

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How to Use this Guidebook

This Quick Start Mini Guidebook provides instructions on how to perform the most commons functions in the Concur system. For details on performing all functions please refer to the Step-by-Step Guide.

Please note references in some functions to additional resources available on that topic, including the Step-by-Step Guide and Quick Reference Cards (QRC). If you have questions about the content of this guide or need additional assistance, please contact:

University Travel Office

Phone: 919-962-0210

Email: concur@unc.edu

Webpage: finance.unc.edu/services/travel/

Signing into Concur

Users can log in to Concur via the Travel Services webpage or after signing into ConnectCarolina.

Via the Travel Services Webpage

1. Go to <http://finance.unc.edu/services/travel/> by entering it into your internet browsers address bar.

2. Click the **Concur** link.

Result: The Single Sign-On (SSO) prompt will appear.

3. Enter your **ONYEN** and **Password**.
4. Click the **Sign in** button.

Single Sign-On

Onyen -or- UNC Guest ID

Password

Sign in

Reset password for [Onyen](#) | [UNC Guest ID](#) or get [help](#).

Important To protect your personal information, you must close every instance of this browser that is open on your computer when you log out.

5. **Result:** You will be prompted to complete Duo Authentication.

Via ConnectCarolina

1. Go to <https://connectcarolina.unc.edu/> by entering it into your internet browsers address bar.
2. Click the **Log In** button.
3. Complete the Single Sign-On (SSO) by entering your ONYEN username, password, and Duo Authentication.

4. Click the **Concur** link from the Admin WorkCenter, Self Service or Faculty Portal.

Result: Your SSO credentials will automatically be verified with your Concur Username and you will be logged into the Concur system.

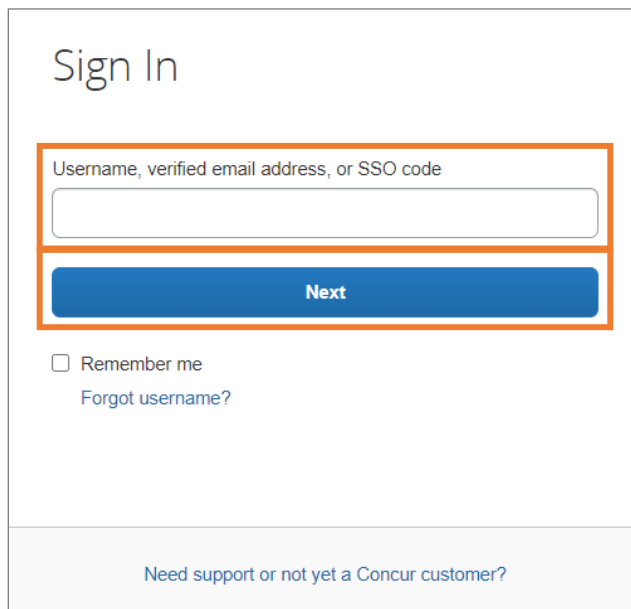
Via Concur Directly

You can also log in to your Concur account by directly accessing their site at concursolutions.com. After navigating to concursolutions.com, follow these steps to login:

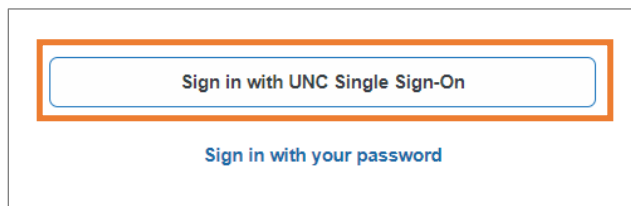
1. Enter your username as your ONYEN@unc.edu.

Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.

2. Click the **Next** button.

A screenshot of the Concur 'Sign In' page. The title 'Sign In' is at the top. Below it is a text input field with the placeholder text 'Username, verified email address, or SSO code'. An orange rectangular box highlights this input field and the blue 'Next' button located directly below it. Under the 'Next' button, there is a checkbox labeled 'Remember me' and a link 'Forgot username?'. At the bottom of the form, there is a link that says 'Need support or not yet a Concur customer?'.

3. Click the **Sign in with UNC Single Sign-On** button

A screenshot showing two sign-in options. The top option is a button labeled 'Sign in with UNC Single Sign-On', which is highlighted by an orange rectangular box. Below this button is a link that says 'Sign in with your password'.

Result: You will be taken to the UNCCH Single Sign-On page.

4. Enter your **ONYEN** and **Password**.

5. Click the **Sign in** button.

The image shows a 'Single Sign-On' form. It has a title 'Single Sign-On' at the top. Below the title is a box containing two input fields: 'Onyen -or- UNC Guest ID' and 'Password'. Below these fields is a blue button labeled 'Sign in'. Below the button, there is a link to 'Reset password for Onyen | UNC Guest ID or get help.' and an 'Important' note: 'To protect your personal information, you must close every instance of this browser that is open on your computer when you log out.'

Result: You will be prompted to complete Duo Authentication.

6. Complete the Duo Authentication.
7. **Result:** You will arrive at the Concur homepage.

Note: Once signed into Concur, if you bookmark the page the link will appear as <https://concursolutions.com>. When using the bookmark in the future, you will be brought to the main Sign In page for Concur.

Exploring the Concur Homepage

The Concur home page provides direct access to Concur Expense, Requests, and Approvals. To return to the Concur home page from any other page, click the SAP Concur logo on the top left of the screen.

Section	Description
Quick Task Bar	This section provides Quick Task (links) so you can: <ul style="list-style-type: none"> • Start a new report or request • Open reports and requests • Manage available expenses • Manage approvals
My Tasks	This section shows: <ul style="list-style-type: none"> • Required Approvals – Shows listing of Travel and Expense Requests that require your approval. • Available Expenses – Shows listing of expenses and receipts received from T&E Cards, Mobile App, Direct Airfare billing that have not been assigned to an Expense Report. • Open Reports - Shows listing of Expense Reports that are open and have not been submitted.
Company Notes	Content is provided by UNC-CH Travel Services.

Quick Task Bar

COMPANY NOTES Shows total number of tasks for each tile.

MY TASKS

- Required Approvals** → 00
Great! You currently have no approvals.
- Available Expenses** → 00
You currently have no available expenses.
- Open Reports** → 00
You currently have no open reports.

Updating Your Profile

You can use the Profile Options page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, etc.) complete your profile after logging into Concur for the first time and update it whenever your information changes.

Options	Description
Your Information	Select personal information, work address, home address, contact information, and verify email address.
Request Settings	Select request information, add or remove delegates, enter email preferences, select approvers, and add or remove attendees.
Expense Settings	Select expense information, add or remove delegates, enter email preferences, select approvers, setup personal car, and add or remove attendees.
Other Settings	Provides settings such as E-Receipts Activation and Concur Mobile Registration that you can set or update.

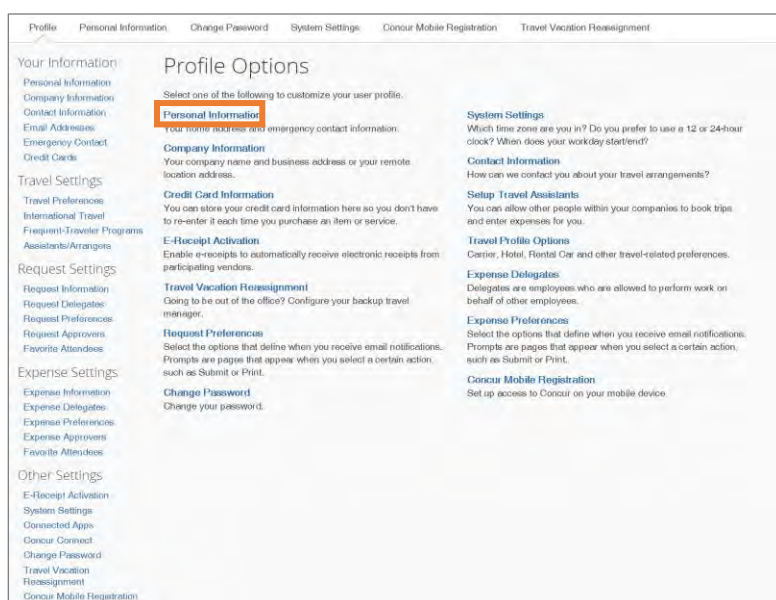
Accessing Your Profile Information

Follow these steps to access your profile information:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.

Result: You will be directed to the Profile Options page.

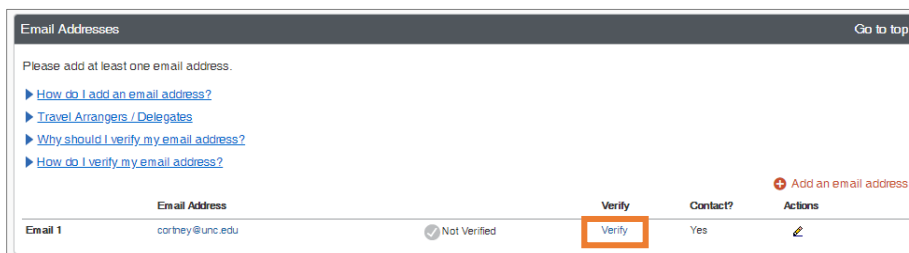
3. On the Profile Options page, review the **Your Information** section, and select the appropriate links to update your profile information.



Verifying Your Email Address

When you setup your account, you should verify your email address. This will allow you to send and receive email receipts to your Available Receipt library. Follow these steps to verify an email address:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.
3. From the menu on the left, click the **Email Addresses** link in the Your Information section.
4. Click the **Verify** link in the verify column of the Email address you wish to verify.

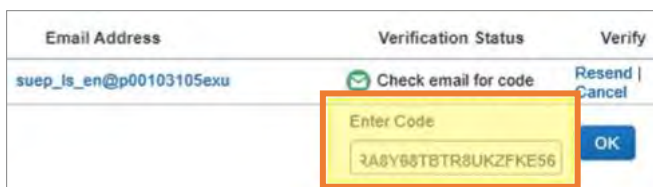


Result: An alert message will appear.

5. Click the **OK** button.

Result: A verification code will be sent to the selected email address from Concur.

6. Using the code from the email you received, **enter the code** in the Enter Code field, next to the appropriate email address.

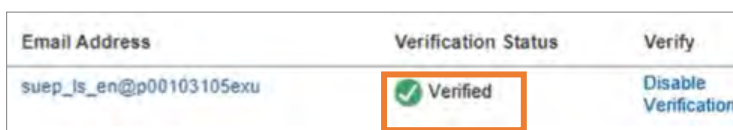


7. Click the **OK** button.

Result: A pop-up message will appear.

8. Click the **OK** button, on the pop-up message.

Result: Verification Status will change to Verified with a green check icon.



Using Expense Assistant

Expense Assistant adds all your incoming UNC-CH Travel & Expense Card transactions to a monthly expense report based on the post date of the transactions.

Enabling Expense Assistant

Follow these steps to enable Expense Assistant:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.
3. Click the **Expense Preferences** link.

The screenshot shows the 'Profile Options' page with a sidebar on the left containing various settings categories. The 'Expense Preferences' link under the 'Expense Settings' category is highlighted with an orange box. The main content area lists various settings like Personal Information, Company Information, Credit Card Information, E-Receipt Activation, Travel Vacation Reassignment, Request Preferences, Change Password, System Settings, Contact Mobile Registration, and Travel Vacation Reassignment.

4. Select **By Month or By Trip** from the Sign me up from the down menu.

The screenshot shows the 'Expense Preferences' form. It includes a 'Save' button and a 'Cancel' button. Below these are sections for 'Send email when...', 'Prompt...', 'Display...', and 'Sign me up for...'. The 'Sign me up for...' dropdown menu is highlighted with an orange box, showing a 'Please select' option.

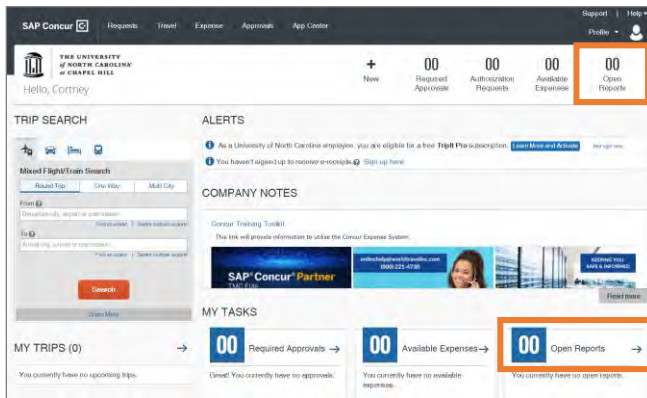
5. Click the **Save** button.

Result: Your Expense Preferences are saved, and Expense Assistant will begin adding transactions to a monthly or by trip expense report. On the Manage Expenses screen, you can view your newly created reports. Transactions are added to your reports based on their transaction post date.

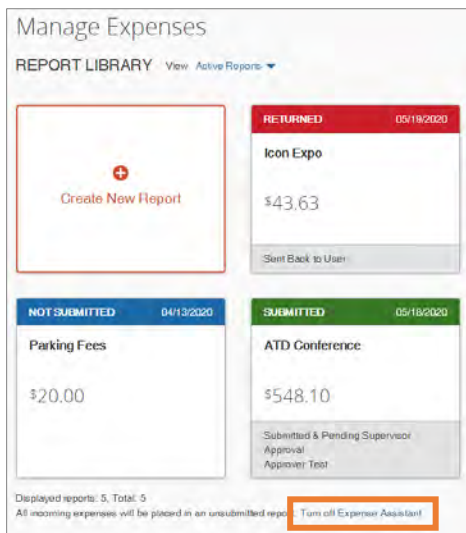
Disabling Expense Assistant

To stop all incoming transactions from being placed on an unsubmitted report, you can disable Expense Assistant. Follow these steps to disable Expense Assistant:

1. Click the **Open Reports** tab or the tile from the Concur Home page.

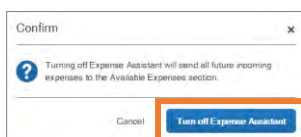


2. Click the **Turn off Expense Assistant** link.



Result: A confirmation pop-up message will appear.

3. Click the **Turn off Expense Assistant** Button.



Using Delegates

The Concur system allows you to create delegates who can act on your behalf. A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating or approving requests and expense reports. You can create the following types of delegates:

Approval Delegate - An Approval Delegate can assist in reviewing or approving Requests and Expense Reports on your behalf. Approval Delegates can use the Preview feature to send an email notification to the user when a request or report is ready for their approval.

Personal Delegate - A personal delegate can assist in preparing Requests and Expense Reports on your behalf. Additional permissions may include the ability to view receipt images and/or receive copies of emails. However, Personal Delegates cannot submit reports on your behalf. Personal Delegates can use the Notify feature to send an email notification to the user when a request or report is ready to be submitted.

Delegates may be managed and assigned through the Request Delegates link on the Profile Options page or by following the steps below to access the Expense Delegates link. Regardless of the navigation path chosen, Delegates will have the same access in Request and Expense.

Creating a Delegate

Follow the steps below to create a delegate:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.

Result: You will be directed to the Profile Options page.

3. Click the **Expense Delegates** link.

The screenshot shows the 'Profile Options' page with a list of settings on the left and right. The 'Expense Delegates' link is highlighted with an orange box. The settings include: Personal Information, Company Information, Credit Card Information, E-Receipt Activation, Travel Vacation Reassignment, System Settings, Contact Information, Setup Travel Assistants, Travel Profile Options, and Expense Delegates.

4. Click the **Add** button.

The screenshot shows the 'Delegates' page with a table of delegates. The 'Add' button is highlighted with an orange box. The table has columns: Name, Can Prepare, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, and Can Prepare Temporary. The table is currently empty, showing 'No records found.'

5. Begin entering the name of the employee you want to assign as a delegate.

The screenshot shows the 'Delegates' page with a search input field. The search input field is highlighted with an orange box. The input field has a placeholder text: 'Search by employee name, email address, employee id or login id'. There are 'Add', 'Save', and 'Delete' buttons above the input field.

6. Click on the employee you wish to add as a delegate.
7. Select the task(s) you want to delegate or perform on your behalf and what notifications they should receive.

Personal Delegate Options:

- **Can Prepare** – This allows the delegate to prepare requests or expenses on your behalf.
- **Can View Receipts** – This allows the delegate to view receipts that are uploaded to your account in the Concur system.
- **Receives Emails** – This allows the delegate to receive the same email notifications that you receive based on your email notification settings.

Approval Delegate Options:

- **Can Approve** – This allows the delegate to review and approve requests or expenses on your behalf.
- **Can Approve Temporary** – This allow the delegate to review and approve requests or expenses on your behalf only during the designated time frame.
- **Can Preview for Approver** – This allows the delegate to review a request or report and then notify the Approver once it is ready for their approval.
- **Receives Approval Emails** – This allows the delegate to receive the same email notifications that a user who is an approver receives.

	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	ABARBANELL, Jeffery test@test.unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	Arnold, Rebecca test@test.unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	Test, Jane@CS Jane@CS@unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>

8. Click the **Save** button.

Delegates

Delegate For

Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
You may assign a temporary approver for a maximum of 120 days.
Expense and Request share delegates. By assigning permissions to a delegate, you

Deleting a Delegate

Follow these steps to delete a delegate:

1. Follow steps 1 to 3, from **Creating a Delegate**.
2. Check the box beside the individual you want to remove as a delegate.
3. Click the **Delete** button.

Delegates

Delegate For

Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
You may assign a temporary approver for a maximum of 120 days.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary
<input checked="" type="checkbox"/>	ABARBANELL, Jeffery test@test.unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
<input type="checkbox"/>	Arnold, Rebecca test@test.unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>
<input type="checkbox"/>	Test, Jane@CS Jane@CS@unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>

Result: A pop-up message will appear verifying that you want to delete the selected delegate.

4. Click the **OK** button on the pop-up message.

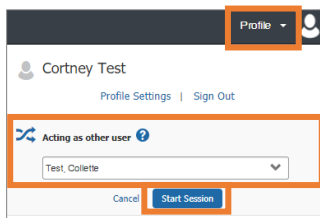
Result: The system will delete the delegate you selected.

Acting as a Delegate

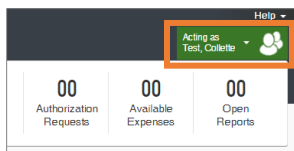
If you have been assigned to work as a delegate, your delegators will define which task(s) you can complete, such as preparing reports or approving on their behalf.

Follow these steps to act as a delegate:

1. Click the **Profile** link.
2. Under the **Acting as other user**, begin entering the name of the employee you want to act on behalf of. Click on the employee you wish to act on behalf of.
3. Click the **Start Session** button.



Result: The Profile menu will display “Acting as” and shows the name you selected. You are now officially working on behalf of that person.

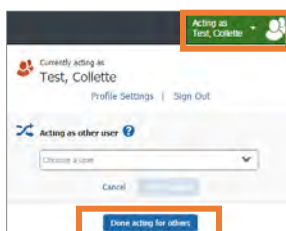


Note: To select a different user, follow the same steps but select a different name.

Stopping Work as a Delegate

Follow these steps to stop working as a delegate:

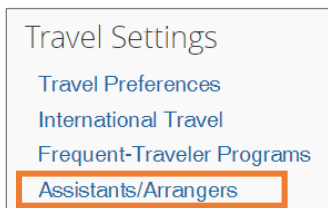
1. Click the **Acting as** link.
2. Click **Done acting for others** link.



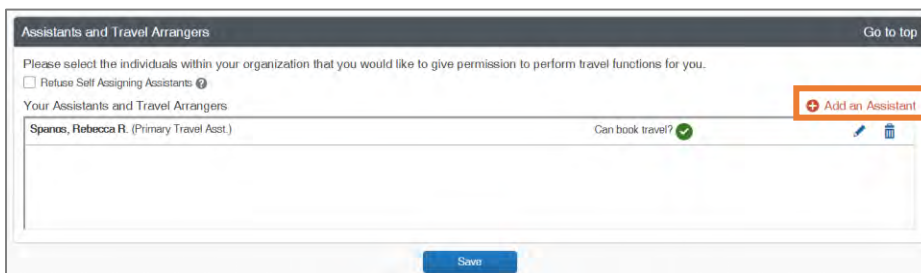
Creating a Travel Assistant

A Traveler can assign a Travel Assistant (Arranger) to manage their travel activities including, booking, canceling, and changing trip information. A Traveler can choose an arranger in the Profile section. Follow these steps to create a Travel Assistant:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.
Result: You will be directed to the Profile Options page.
3. In the Travel Settings section, click the **Assistants/Arrangers** link.



4. Click the **Add an Assistant** link.



Result: The Add an Assistant pop-up window will appear.

5. In the Assistant field, enter the name of the individual(s) you would like to be your Travel Assistant.
6. Mark the checkbox for **Can book travel for me**.
7. Mark the checkbox **Is my primary assistant for travel**, if applicable.

8. Click the **Save** button.

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

☐ Can book travel for me

☐ Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

Save Cancel

Result: The selected individual will be listed as a Travel Assistant/Arranger.

9. Click the **Save** button.

Assistants and Travel Arrangers

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers

Spanos, Rebecca R. (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	Edit Delete
Alston, Courtney	Can book travel? <input checked="" type="checkbox"/>	Edit Delete

Save

Deleting a Travel Assistant

Travel Assistants (Arrangers) can be removed at any time by the Traveler or by the Travel Assistant (Arranger) themselves.

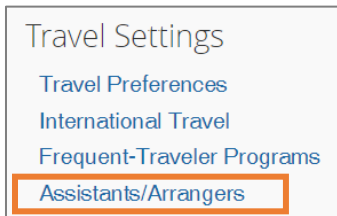
If you are the Traveler

Follow these steps to delete a Travel Assistant or Arranger from your profile:

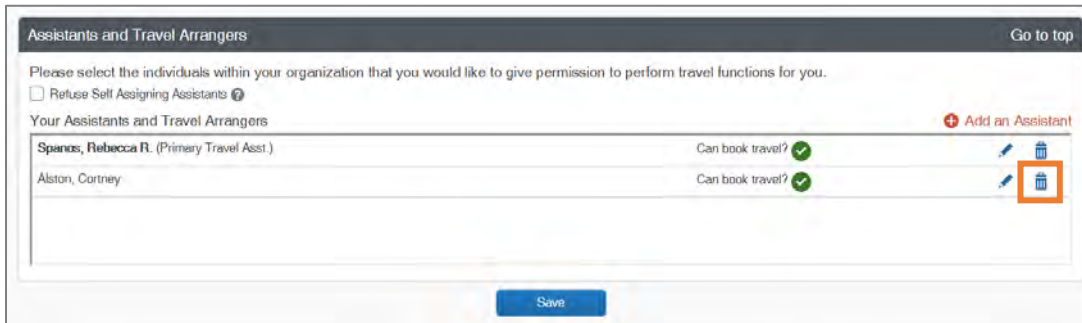
1. Click the **Profile** link.
2. Click the **Profile Settings** link.

Result: You will be directed to the Profile Options page.

3. In the Travel settings section, click the **Assistants/Arrangers** link.

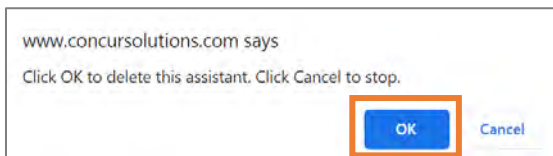


4. Click the **Trashcan** icon beside the individual(s) you want to delete.



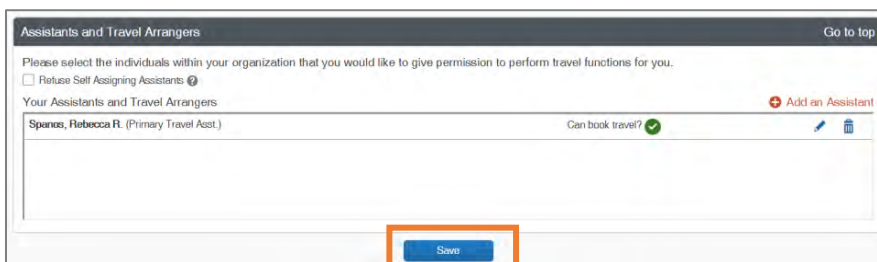
Result: A pop-up confirmation message will appear.

5. Click the **OK** button.



Result: The Travel Assistant is deleted from the listing.

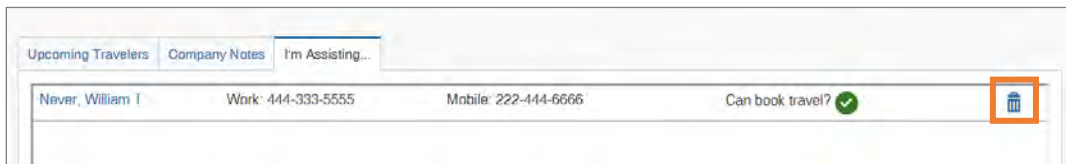
6. Click the **Save** button



If you are a Travel Assistant/Arranger

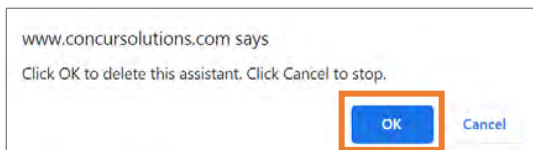
Follow these steps to delete yourself as being a Travel Assistant or Arranger for a Traveler:

1. Click on the **Travel** tab.
2. Click the **Arrangers** tab.
3. Click the **I'm Assisting** tab.
4. Click the **Trashcan** icon beside the Traveler you want to delete yourself from as a Travel Assistant.



Result: A pop-up message will appear.

5. Click the **OK** button.



Result: You will no longer have the ability to book travel for the selected Traveler and their name is removed from the listing.

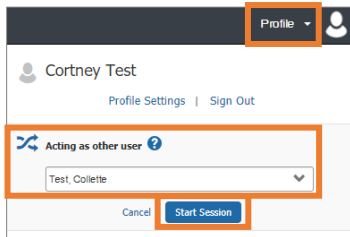
Acting as a Travel Assistant

A Travel Assistant (Arranger) can manage travel activities (book, cancel, change trips, etc.) for travelers. Individuals who have been designated as a Travel Assistant can:

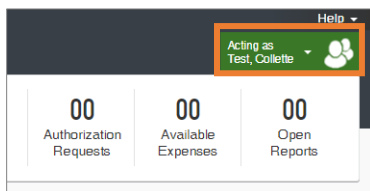
- Book flight, rental car, hotel, etc.
- View upcoming trips
- Manage trips actions such as change or cancel a trip for a traveler,
- View/Filter travelers by name or date of traveler
- View trip segment information without having to access the full itinerary
- Access the airline's check-in webpage to check the Traveler in for a flight
- Access TSA wait time information
- Add another travel arranger for a traveler
- Discontinue their own arranger association with a traveler

If you have been designated as a Travel Assistant or Travel Arrangers, follow these steps to manage and administer travel for another user.

1. Click the **Profile** link.
2. Under the **Acting as other user**, begin entering the name of the employee you want to act on their behalf.
3. Click on the employee you wish to act on their behalf.
4. Click the **Start Session** button.



Result: The Profile menu will display “Acting as” and shows the name you selected. You are now officially working on behalf of that person.



Note: After signing in to Act as a Delegate you will need to access the Travel Arranger View page to manage travel for other users.

5. Click the **Travel** tab.
6. Click the **Arrangers** tab.

Result: You will be brought to the Travel Arrangers View page and can begin managing travel on behalf of another user.

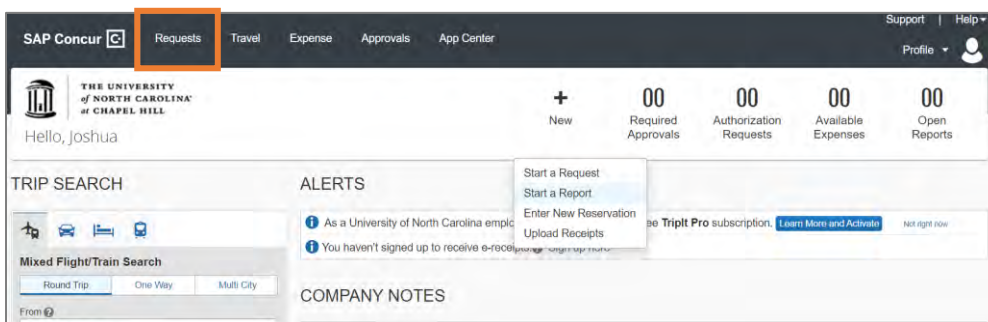
Creating a Travel Request

In advance of any University business travel which includes airfare, lodging, and/or meal per diem, you should create and submit a travel request prior to making any travel arrangements.

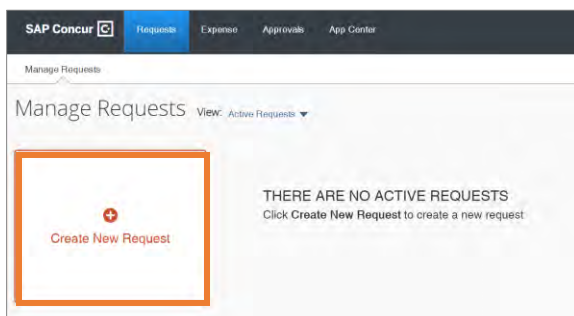
Creating a New Travel Request

Follow these steps to create a travel request:

1. From the Concur home page, click the **Requests** tab.



2. Click the **Create New Request** tile.



3. Enter the required (noted by red asterisks) and necessary optional fields.

Notes:

- The Traveler Type, Business Unit, and Department ID fields will automatically populate based on your ONYEN and user profile.
- It is considered best practice to include the main destination of the trip and the first day of travel for the request name. For example (Nashville, TN – 08/08/2020).

4. Click the **Create** button.

Result: A Request ID number will be generated, and you can add any anticipated travel expenses. The Request ID number replaces the CABS Number when using the Direct-Billing option with the University's travel agency.

Adding Personal Travel (if applicable)

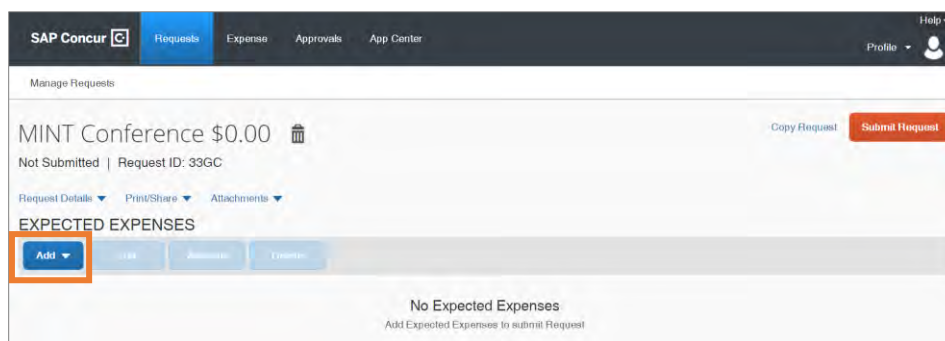
If the travel request will include personal travel it should be documented when creating and submitting the request.

5. Select **Yes**, from the Does this trip include personal travel dropdown.
6. Enter the dates of the personal travel.

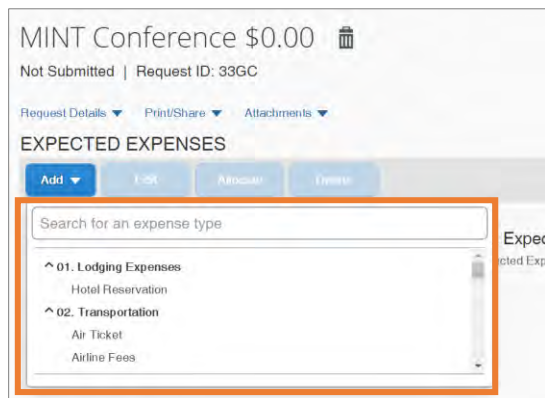
Adding Expenses to a Travel Request

After creating the Travel Request you can add airfare, lodging, or other anticipated expenses. At least one expense must be added to the request before it can be submitted. Follow these steps to add expenses to a travel request:

7. Open the travel request and click the **Add** button.



8. Select the type of expense you need to add.



Adding Lodging Expenses to a Travel Request (if applicable)

If you selected Lodging Expenses from step 8, follow these steps to add anticipated lodging expenses:

9. Enter the required (noted by red asterisks) and necessary optional fields.

Note: If Third Party Lodging is selected as the vendor, you must attach the [Non-Hotel Lodging Authorization Request Form](#) for your department's review and approval.

10. Click the **Save** button.

New Expense: Hotel Reservation

City * [text box] Date 09/01/2020 [calendar icon] At hh:mm A [clock icon]

Vendor Search for Vendor: [dropdown] Date 09/04/2020 [calendar icon] At hh:mm A [clock icon]

Comment [text box]

Estimated Amount * [text box] Currency US, Dollar [dropdown]

Cancel Save

Result: The expense is added to the listing of expected expenses.

MINT Conference \$500.00

Not Submitted | Request ID: 33GC

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Add New Cancel

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00

Estimated Total: \$500.00

11. If you need to add another anticipated expense, click the **Add** button.

If you are done adding anticipated expenses, click the **Submit Request** button.

Adding Air Ticket Transportation to a Travel Request (if applicable)

If you selected Air Ticket Transportation from step 8, follow these steps to add anticipated travel expenses:

12. Select the **Round Trip** or **One Way** tab.
13. Enter the required (noted by red asterisks) and necessary optional fields.
14. Click the **Save** button.

New Expense: Air Ticket

Round Trip One Way

Outbound

From * To *

Date * Depart at * Comment

09/01/2020 Depart at hh:mm A

Return

Date * Arrive at * Comment

09/04/2020 Arrive at hh:mm A

Estimated Amount * Currency

US, Dollar

Save

Result: The expense is added to the list of expected expenses.

MINT Conference \$975.00

Not Submitted | Request ID: 33GC

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Delete

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/>	Air Ticket	Raleigh (RDU) - Tulsa (TUL) : Round Trip	09/01/2020	\$475.00	\$475.00

Estimated Total: \$975.00

Copy Request Submit Request

15. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

Adding Daily Allowance as an Expense to a Travel Request (optional)

If you selected Daily Allowance Meals from step 8, the Travel Request must include Federal Funding (or an approved exception). The Federal Per Diem rates may be utilized in place of the North Carolina Per Diem Rates. To add the Federal Per Diem rates, follow the steps below to add "Daily Allowance" to your Travel Request:

16. Enter the required (noted by red asterisks) and necessary optional fields.

Note: The Trip Start Date, Trip End date, and Destination City will automatically be added based on the Request Header. Also, the Estimated Amount will automatically calculate once you click the Save button. The Estimated Amount is pulled in from the current GSA, Department of Defense, or Department of State rates. This amount represents the maximum Daily Allowance which you are eligible to request and will be updated when submitting your Expense Report for reimbursement.

17. Click the **Save** button.

New Expense: Daily Allowance \$0.00
09/01/2020

Cancel Save

Allocate

Request/Trip Start Date * 09/01/2020

Request/Trip End Date * 09/04/2020

Destination City * US - Tulsa, Oklahoma

Estimated Amount

Currency US, Dollar

Comment

Result: The Daily Allowance is automatically calculated and added as an Expense. The first and last day of travel are calculated at 75% of the day's total allowance (including incidentals) per Federal policy. The expense is added to the listed of expected expenses.

18. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

MINT Conference \$1,167.50

Not Submitted | Request ID: 33GC

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/> Air Ticket	Raleigh, North Carolina - Tulsa, Oklahoma	09/01/2020	\$475.00	\$475.00
<input type="checkbox"/> Daily Allowance	Tulsa, Oklahoma	09/01/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

Adding a Travel Cash Advance Request

To request a cash advance, you must include the request when you are creating a travel request. This feature will not automatically be enabled and is typically only available for international travel. Contact the [UNC Travel Office](#) if you believe you need access to Travel Cash Advances. Follow these steps to add a cash advance to a travel request:

1. Follow steps 1 to 8 from **Creating a New Travel Request**.
2. Click the **Request Details** dropdown link.
3. Click the **Add Cash Advance** from the dropdown.

The screenshot shows a travel request for the 'MINT Conference' with a total amount of \$1,167.50. The status is 'Not Submitted' and the request ID is '33GL'. A dropdown menu is open under 'Request Details', showing options like 'Edit Request Header', 'Request Timeline', 'Audit Trail', 'Allocation Summary', 'Linked Add-ons', and 'Add Cash Advance'. The 'Add Cash Advance' option is highlighted with an orange box. Below the dropdown, a table lists the request details:

	Date	Amount	Requested
Tulsa, Oklahoma	08/07/2020	\$500.00	\$500.00
Raleigh, North Carolina - Tulsa, Oklahoma	08/07/2020	\$475.00	\$475.00
Tulsa, Oklahoma	08/07/2020	\$192.50	\$192.50

The estimated total is \$1,167.50.

Result: The New Cash Advance popup window will appear.

4. Enter the amount of the cash advance.
5. Click the **Add Cash Advance** button.

The 'New Cash Advance' popup window is shown. The 'Cash Advance Amount' field is set to 500.00, and the currency is 'US, Dollar'. The 'Add Cash Advance' button is highlighted with an orange box.

6. Click the ^ to expand the Alerts section to review the notice.
7. Click **View** in the Cash Advances section.

The screenshot shows the travel request page with the 'Alerts' section expanded. A notice states: 'Any cash advance made by the University is a loan and the recipient is personally responsible for all monies advanced to them. Cash Advances must be reconciled on the expense report within thirty (30) days of trip completion and any unused portions may be deducted from the recipient's wages via payroll. APPROVER NOTICE: This Request includes a Cash Advance. By approving the Request you are also approving the Cash Advance. View'. Below this, the 'CASH ADVANCES' section shows a 'Missing required field: Cash Advance Justification' message, with a 'View' button highlighted. At the bottom, a summary box shows 'CASH ADVANCES: 1' with an amount of \$500.00.

8. In the Cash Advance Justification field, enter the justification for the cash advance request. Please provide as much detail as possible in the justification field.

The screenshot shows the 'MINT Conference' cash advance form. The 'Details' tab is active. The 'Cash Advance Justification' field is highlighted with an orange border. The form includes fields for 'Cash Advance Amount' (500.00), 'Currency' (US, Dollar), 'Request/Trip Start Date' (08/07/2020), 'Request/Trip End Date' (08/10/2020), and 'Requested Disbursement Date' (MM/DD/YYYY). The 'Cash Advance Name' is 'MINT Conference'.

Note: You may click the Quick Help icon next to the Cash Advance Justification field for examples of allowable reasons for a cash advance

9. Click the **Save** button.

Result: The cash advance has been added to the Travel Request and the alert has been cleared.

Adding Attachments to a Travel Request

Some travel will require documentation to be submitted along with a travel request. Follow these steps to add an attachment to a travel request:

1. Open the Travel Request if it is not already selected.
2. Click the **Attachments** drop-down link.
3. Click **Attach Documents** from the drop-down options.

The screenshot shows the 'MINT Conference' travel request form. The 'Attachments' drop-down menu is open, showing the 'Attach Documents' option. The form includes a table of 'EXPECTED EXPENSES' with columns for 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. The total amount is \$1,167.50.

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/> Air Ticket	Raleigh, North Carolina - Tulsa, Oklahoma	09/01/2020	\$475.00	\$475.00
<input type="checkbox"/> Daily Allowance	Tulsa, Oklahoma	09/01/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

Result: A pop-up window will appear for you to add the attachment.

4. Click the **Upload and Attach** link.



5. Select the file you want to attach.

Result: The attachment will upload and an attachment icon will appear.

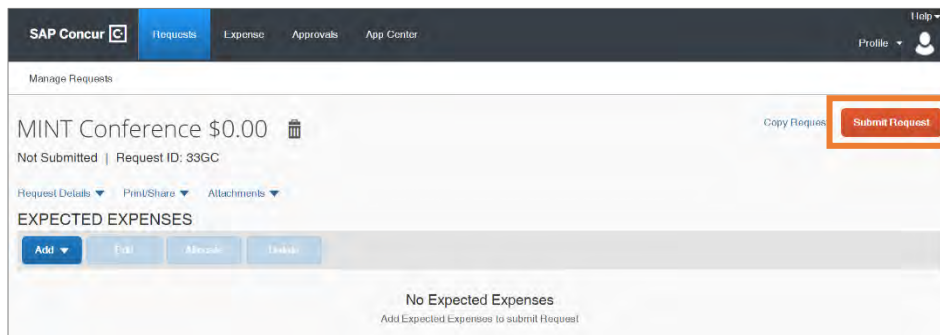
Note: Once a document is attached, click on the **Attachments** drop-down link to view, delete, or attachment more documents. If attaching multiple documents, the files will be merged into one and cannot be separated.

Submitting a Travel Request

If you are acting as a personal delegate and creating a Travel Request on behalf of another user, you will not have the option to submit the travel request. Delegates may prepare the travel request and then use the Notify feature to alert the traveler when the request is ready to be submitted.

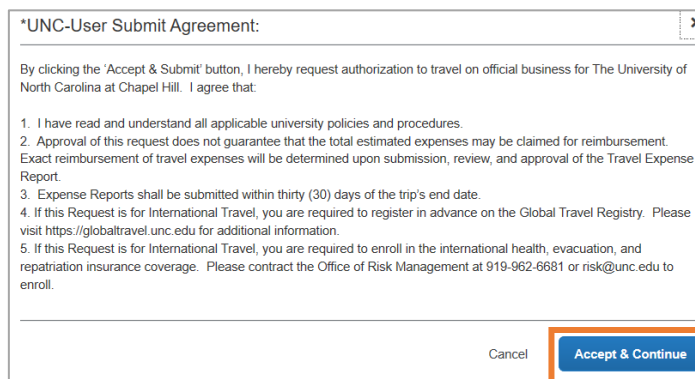
Submitting a Travel Request:

1. Click the Submit Request button in an open request.



Result: The UNC – User Submit Agreement pop-up will appear.

2. Read the agreement carefully and click the **Accept & Continue** button when ready.



Result: The Request status will change to Submitted and the Request will move to the first step of the approval workflow.

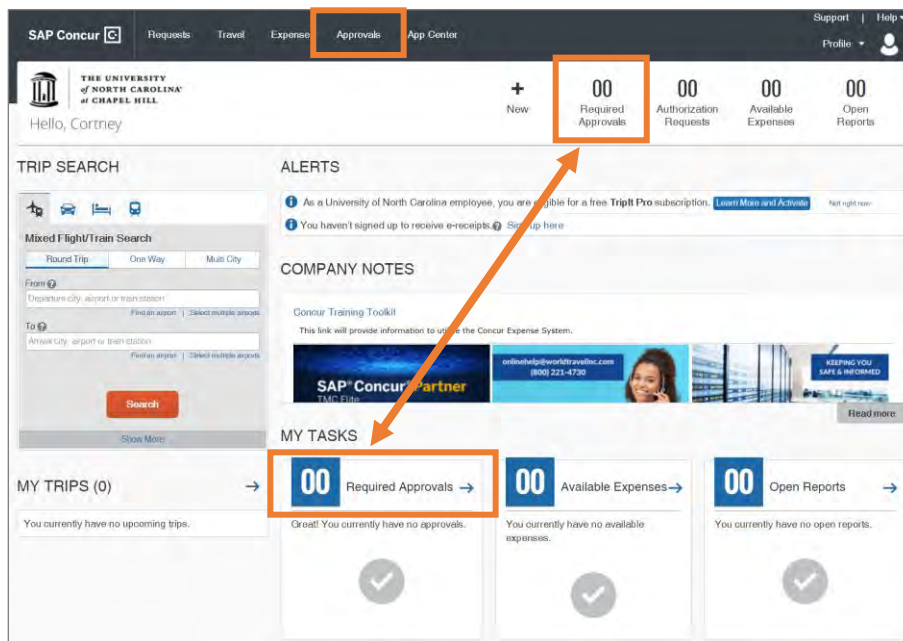
Approving a Travel Request

If you are given the role of an approver in Concur, you will receive an email notification when travel requests are submitted by a user. Approval delegates may also receive email notifications and be able to preview or approve reports, depending on their assigned permissions. To approve requests, you must log in to the Concur system.

Approving a Travel Request

Follow these steps to approve a travel request:

1. From the Concur home page, click the **Approvals** tab or one of the **Required Approvals** tabs.



Result: You will be brought to the Approvals page.

2. Click the **Requests** tab if you are not immediately brought to that tab.

Approvals

08
Requests

07
Expense Reports

Requests

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
<input type="checkbox"/> Travel	MINT Conference	33GE	Cortney, Test	08/03/2020 08/06/2020	08/03/2020	\$1,167.50
<input type="checkbox"/> Travel	A-10 Conference	38CY	Collette, Test	05/19/2020 05/22/2020	05/01/2020	\$200.00
<input type="checkbox"/> Travel	IRS OERI Int #1	33AL	Admin, Test	03/29/2020 03/30/2020	07/09/2020	\$0.01
<input checked="" type="checkbox"/> Travel	IRS OERI Int #12	33AW	Admin, Test	03/29/2020 03/30/2020	03/07/2020	\$5,001.00
<input checked="" type="checkbox"/> Travel	IRS OERI Int #4	33AY	Admin, Test	03/29/2020 03/30/2020	03/07/2020	\$0.01
<input type="checkbox"/> Travel	IRS OERI Allocation #5	33JL	Admin, Test	03/29/2020 03/31/2020	03/10/2020	\$5,001.00
<input type="checkbox"/> Travel	IRS Travel OERI Int - No Ship	33KA	Admin, Test	03/02/2020 03/06/2020	02/25/2020	\$50.00
<input checked="" type="checkbox"/> Travel	High Risk Travel Test	33TP	Admin, Test	02/23/2020 02/24/2020	03/04/2020	\$5,000.00

Result: You will see a listing of the travel requests that are pending approval.

- Click on the **Request Name** link to review the details of the travel request.
- Review the Travel Request.

Note: If you are needing to allocate anticipated expenses, mark the designated checkbox by the expense, then click the Allocate button. For more details on how to allocate an expense view the **Allocating Expenses** in the Step-By-Step Guide. Department Approvers may want to allocate anticipated expenses so that the correct approvers are incorporated into the approval workflow. Allocations created on the Travel Request will copy over to the accompanying Expense Report and may be updated as needed.

- Click the **Approve** button.

MINT Conference \$1,167.50

Submitted & Pending Designated Approver Approval | Request ID: 33GE

Request Details [Print/Share](#)

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested	Approved
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	08/03/2020	\$500.00	\$500.00	\$500.00
<input type="checkbox"/> Air Ticket	Raleigh (RDU) - Tulsa (TUL) - Round Trip	08/03/2020	\$475.00	\$475.00	\$475.00
<input type="checkbox"/> Daily Allowance	Tulsa, Oklahoma	08/03/2020	\$192.50	\$192.50	\$192.50

Estimated Total: \$1,167.50

Result: The UNC-Approver Submit Agreement pop-up message appears.

- Click the **Accept & Continue** button.



Result: The Travel Request is approved, and it will no longer be shown on your list of Approvals.

Making Reservations and Booking Travel

Booking a Trip on Concur Travel is similar to how you would book a personal trip online. Users of the system can book travel themselves as the Traveler or utilize a designated Travel Assistant/Arranger to make the booking and travel reservations.

Booking a Flight

If a Traveler needs to make reservations for a trip that includes a flight/train, the booking process will always begin with booking a flight/train, regardless if lodging, and car rental are needed as well. You will have the opportunity to specify that you need a car and/or hotel on the Flight/Train tab. Follow these steps to book a flight/train:

1. From the Concur Homepage, click the **Travel** tab.

Result: by default, the Flight/Train tab option will be selected.

2. Select one of the following:

- **Round Trip**
- **One Way**
- **Multi City**

TRIP SEARCH

Mixed Flight/Train Search

Round Trip One Way Multi City

From ?
Departure city, airport or train station
Find an airport | Select multiple airports

To ?
Arrival city, airport or train station
Find an airport | Select multiple airports

Search

[Show More](#)

3. In the **From** and **To** fields, enter the cities for travel.
Note: When you enter a city, airport name, or airport code, the system will automatically search for a match. You can also use the Find an airport link or Select multiple airport links as needed.
4. In the **Depart** and **Return** fields, select the appropriate dates and times.
5. If you need a hotel and/or car rental mark the **Pick-up/Drop-off car at airport** and/or **Find a Hotel**. Otherwise, continue to the next step.
6. Click the **Search** button.

TRIP SEARCH

Mixed Flight/Train Search

Round Trip One Way Multi City

From ?
RDU - Raleigh/Durham Airport - Raleigh/Durham, NC
Find an airport | Select multiple airports

To ?
LAX - Los Angeles Intl Airport - Los Angeles, CA
Find an airport | Select multiple airports

Depart ?
04/19/2021 depart 09:00 am ± 2

Return ?
04/23/2021 depart 05:00 pm ± 2

☐ Pick-up/Drop-off car at airport
☐ Find a Hotel

Class ?
Economy class

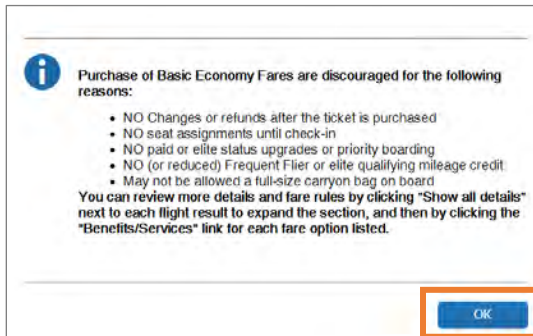
Search by
Price

☐ Specify a carrier ?

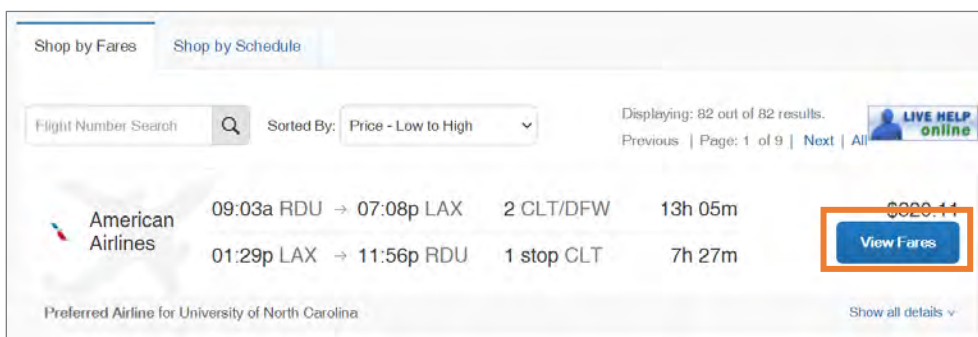
Search

Result: A pop-up window to review Basic Economy Fares information will appear and a listing of reservations options.

7. Review the Basic Economy Fares information.
8. Click the **Ok** button.

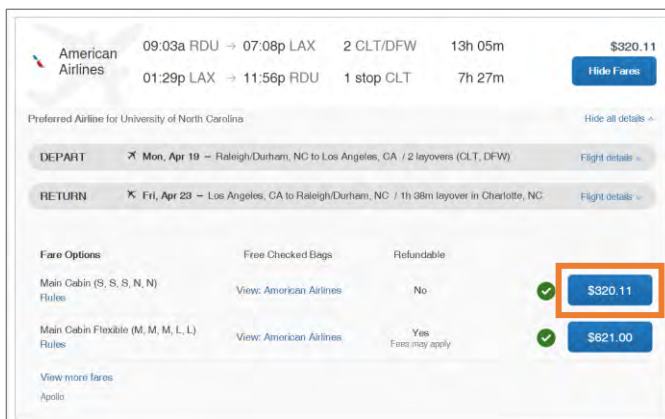


9. Click the **View Fares** button next to the preferred itinerary to view available booking options



10. Click the **blue fare button** that shows the amount of the fare to proceed.

Result: The Review and Reserve Flight page will appear.



Important: Fare that is flagged as “Out-of-Policy” can be booked. When selected the system will present the user with an Out-of-Policy pop-up window. Users must then select the reason this “out-of-policy” fare is being selected. Simultaneously, the system will maintain historical data of “in-policy” bookings that were available at the time as well.

Result: The Review and Reserve Flight page will appear.

11. Click the **Select a Seat** links in the Select Seats section to select your seat for departure and returning flights.



Flight	Seat
AA 1906 Main Cabin Flexible (M)	Select a seat
AA 665 Main Cabin Flexible (M)	Select a seat
AA 969 Main Cabin Flexible (M)	Select a seat
AA 1925 Main Cabin Flexible (L)	Select a seat
AA 494 Main Cabin Flexible (L)	Select a seat

12. Select a **Payment Method**.

13. Click the **Reserve flight and Continue** button.



SELECT A METHOD OF PAYMENT

How would you like to pay?

Please choose a credit card. Add credit card

* Indicates credit card is a company card

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

Back Reserve Flight and Continue

Result: The system reserves the flight and Travel Details page appears noting that the flight has been secured.

14. **Adding a Car:** If you marked the box Pick-up/Drop-off car at airport from step 5 the rental car search results will appear. Review the section, [Booking a Rental Car](#), for instructions on how to secure a car rental.

Adding a Hotel: If you marked the box Find a Hotel from step 5, hotel search results will appear. Review the section, [Booking a Hotel](#), for instructions on how to add hotel lodging.

15. Review the Total Estimated Cost and other itinerary information for your travel itinerary on the Travel Details page and make any necessary changes.
16. Click the **Next** button at the bottom of the page.

TOTAL ESTIMATED COST	
<div>Air View Fare Rules</div> <div>Airfare quoted amount: \$533.30 USD</div> <div>Taxes and fees: \$87.70 USD</div> <div>Total Estimated Cost: \$621.00 USD</div>	
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
<p>If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.</p> <div> Next >> Cancel Trip </div>	

Note: If your trip does not include a car rental or hotel reservations a pop-up message will appear. Click the OK button.

17. Enter the **Trip Name**, **Trip Description**, and the **Concur Request ID number** associated with the travel.

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name
This will appear in your upcoming trip list.

Trip Description (optional)
Used to identify the trip purpose.

Concur Request ID (Required)

18. Click the **Next** button.

Result: The Trip Confirmation page will appear.

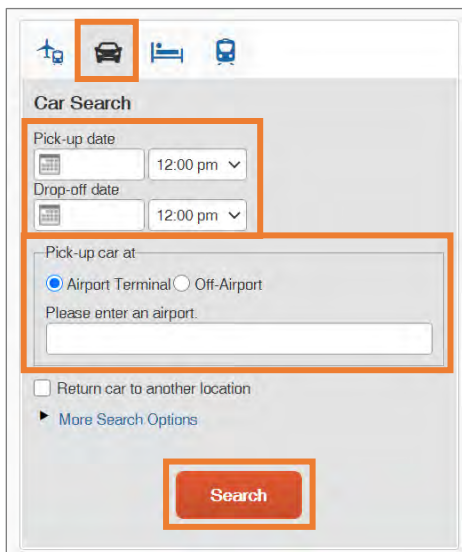
19. Click the **Purchase Ticket** button to confirm the itinerary.

TOTAL ESTIMATED COST	
<div>Air View Fare Rules</div> <div>Airfare quoted amount: \$533.30 USD</div> <div>Taxes and fees: \$87.70 USD</div> <div>Total Estimated Cost: \$621.00 USD</div>	
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
<p>Almost done... Please confirm this itinerary.</p> <div> Display Trip << Previous Purchase Ticket>> Cancel Trip </div>	

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking a Rental Car

1. Complete one of the following:
 - If your travel does not require airfare and you only need to request a car rental, click the **Car** icon.
 - Or
 - If you marked the check box Pick-up/Drop Off Car at airport from step five in Booking a Flight continue to step 6.
2. Enter your **Pick-up and Drop-off dates and times**.
3. In the Pick-up car at section select one of the following:
 - Select **Airport Terminal** and enter the City or the Airport Code.
 - Or
 - Select **Off-Airport** and enter, or search for the location.
4. Mark the check box **Return car to another location** if the Drop-off location will be different from the Pick-Up location and select the appropriate location.
5. Click the **Search** button.




The screenshot shows a 'Car Search' form. At the top, there are four icons: a plane, a car, a bed, and a train. The car icon is highlighted with an orange box. Below the icons, the form is titled 'Car Search'. It contains several fields: 'Pick-up date' and 'Drop-off date', both with calendar icons and time dropdowns set to 12:00 pm. These two fields are grouped together in an orange box. Below them is a section titled 'Pick-up car at' with two radio buttons: 'Airport Terminal' (selected) and 'Off-Airport'. Below the radio buttons is a text input field with the placeholder 'Please enter an airport.' This entire section is also highlighted with an orange box. At the bottom of the form, there is a checkbox labeled 'Return car to another location' and a link 'More Search Options'. The 'Search' button, which is orange with white text, is highlighted with an orange box.

Result: Search results will appear, and you have the option to filter the search results.

6. Select the **blue fare button** for the car you want to rent.

Displaying: 9 out of 112 results. ?



Intermediate Car - \$34.75 per day (Apollo)

Automatic transmission
Unlimited miles, Pick-up: Terminal: RDU
Adults: 4, Large bags: 1, Small bags: 2**
(Corporate rate)

Total cost*

\$202.03

Preferred Car Vendor for University of North Carolina / E-Receipt Enabled ?

[Location details](#)

Result: The Review and Reserve Car page will appear.

- Provide any rental car preferences and driver information, as necessary.

Note: In the Travel Details section, you can print/email the itinerary, change, or cancel the reservation.

- Click the **Reserve Car and Continue** button.

Review and Reserve Car

REVIEW RENTAL CAR
Enterprise Car Rental [Location Details](#)

Type	Pick-up	Drop-off
Intermediate Car	Airport Terminal	Airport Terminal
Features	RDU - Raleigh/Durham 12:00 pm Mon, 04/19/2021	RDU - Raleigh/Durham 12:00 pm Fri, 04/23/2021

PROVIDE RENTAL CAR PREFERENCES
Your preferences and comments will be passed to the rental car agency.
Comments (50 character max)

ENTER DRIVER INFORMATION
Ensure the name below matches the I.D. you have with you on the day of pick-up. ?

Driver
Name: William Testa Neven Phone: 444-333-5555 Email: chattman@westtravelinc.com [Edit](#) | [Review all](#)

Rental Car Agency Program [Add a Program](#)
No Program selected

REVIEW PRICE SUMMARY

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$34.75	Apr 19 - Apr 23	\$202.03*
Total Estimated Cost: \$202.03			
Total Due Now: \$0.00**			

* Rental provider's estimated amount. Exact fees unknown. Does not include additional fees incurred during time of travel.
** Remaining amount due at rental location.

[Back](#) [Reserve Car and Continue](#)

Result: The Travel Details Page will appear.

- Click the **Next** button.

Result: The Trip Booking Information page will appear.

- Enter a **Trip Name**, **Trip Description**, and the **Concur Request ID** number associated with the travel.

- Click the **Next** button.

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name This will appear in your upcoming trip list. <input type="text" value="Car/Hotel Reservation"/>	Trip Description (optional) Used to identify the trip purpose. <input type="text"/>
------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------

Result: The Trip Confirmation page will appear.

12. Review the trip details.

13. Click the **Confirm Booking** button.

TOTAL ESTIMATED COST

Car:	\$202.03 USD
Total Estimated Cost:	\$202.03 USD

Almost done... Please confirm this itinerary.

[Display Trip](#)
[<< Previous](#)
[Confirm Booking>>](#)
[Cancel Trip](#)

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking a Hotel

1. Complete one of the following:

- If your travel does not require airfare and you only need to request hotel lodging, click the **Hotel** icon.

Or

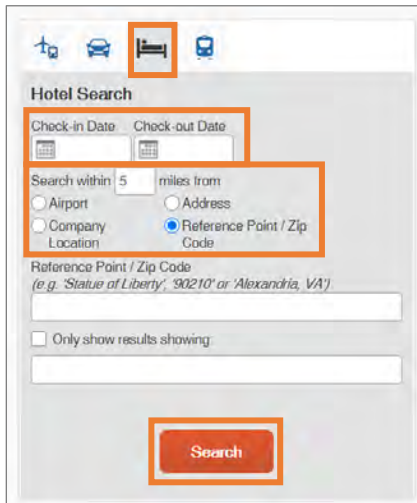
- If you marked the check box, **Find a Hotel** from step five in Booking a Flight continue to step 4.

2. Enter the **Check-in** and **Check-out Dates**.

3. Enter the search radius.

Note: You can choose to search near an airport, an address, or near another location.

4. Click the **Search** button.



The screenshot shows a web interface for hotel booking. At the top, there are four icons: a plane, a car, a bed (highlighted with an orange box), and a train. Below these is the 'Hotel Search' section. It contains two date pickers for 'Check-in Date' and 'Check-out Date' (highlighted with an orange box). Below the dates is a section for 'Search within' with a dropdown set to '5' miles from, and four radio button options: 'Airport', 'Address', 'Company Location', and 'Reference Point / Zip Code' (which is selected and highlighted with an orange box). Below these is a text field for 'Reference Point / Zip Code' with the example '(e.g. "Statue of Liberty", "90210" or "Alexandria, VA")'. There is also a checkbox for 'Only show results showing:' followed by a text field. At the bottom of the form is a red 'Search' button (highlighted with an orange box).

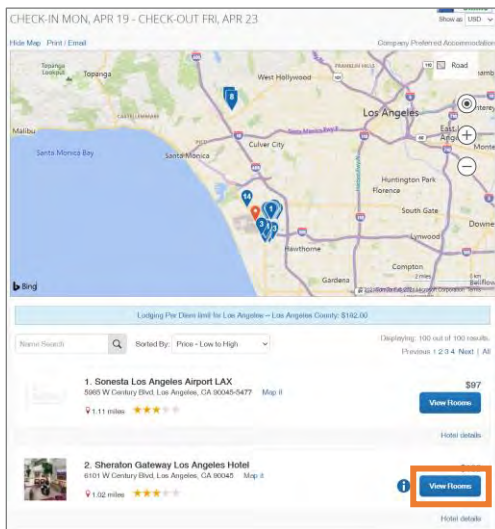
5. If applicable, review the Hotel Per Diem Locations page. Then click the **Next** button.

Result: The Search results will appear, and you have the option to filter and or sort the search results.

6. Review the search results:

- Click the **hotel picture** to see more images.
- Click **Hotel Details** to see contact information, street address, cancellation policy and information about the facility.
- Click **View Rooms** to see available room options and rates, amenities, and rules for cancellation policy.

7. Click the **View Rooms** button next to the hotel you want to select.

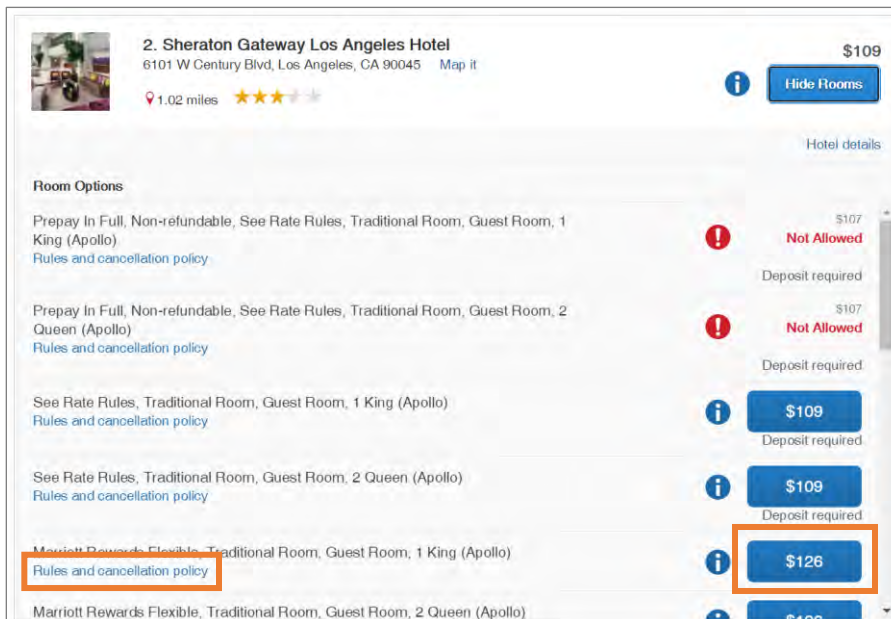


Result: The Review and Reserve Hotel page appears.

8. Review the hotel rate rules and cancellation policies.

Note: Room Options marked with a red exclamation point icon cannot be booked due to University Travel guidelines and/or policy.

9. Select the **blue hotel rental fee** button for the room you want to rent.



Result: The Review and Reserve Hotel page appears.

10. Provide any hotel room preferences, if applicable.
11. Select the **Method of Payment**.
12. Mark the check box to accept the rate details and cancellation policy.

13. Click the **Reserve Hotel and Continue** button.

Result: The Travel Details page appears.

The screenshot shows a booking page with two main sections. The first section, 'SELECT A METHOD OF PAYMENT', has a dropdown menu for 'Please choose a credit card' and an 'Add credit card' link. The second section, 'ACCEPT RATE DETAILS AND CANCELLATION POLICY', displays details for the 'Sheraton Gateway Los Angeles Hotel'. It includes a warning to review rate rules and restrictions, followed by the hotel's provided information: 'TOTAL RATE: 606.22 USD' and 'EXTRA PERSON: AFTER 2 PEOPLE - 20.00 USD PER EXTRA PERSON PER NIGHT'. A red banner states 'RATE CHANGES OVER DURATION OF STAY'. At the bottom, there is a checkbox for 'I agree to the hotel's rate rules, restrictions, and cancellation policy' and two buttons: 'Back' and 'Reserve Hotel and Continue'.

14. Enter a **Trip Name**, **Trip Description**, and the **Concur Request Id** number associated with the travel.

The screenshot shows a 'Trip Booking Information' form. It includes a note that the trip name and description are for record keeping convenience. There are two input fields: 'Trip Name' (with a sub-note 'This will appear in your upcoming trip list.') and 'Trip Description (optional)' (with a sub-note 'Used to identify the trip purpose'). Below these is a 'Concur Request ID (Required)' field. The 'Trip Name' and 'Trip Description' fields are highlighted with an orange box, and the 'Concur Request ID' field is highlighted with another orange box.

15. Click the **Next** button.

16. Click the **Confirm Booking** button.

Result: The Trip Confirmation page appears.

17. Review the details of the trip and make any changes if necessary.

18. Click the Confirm Booking button.

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking Travel as an Assistant

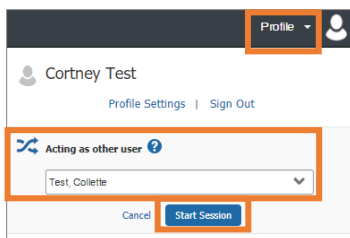
As an Assistant the Travel Arranger View makes it easy for you to manage travel for travelers. If you have been assigned to work as a Travel Assistant, your Traveler will define which task(s) you can complete:

Follow these steps to book travel as a Travel Assistant:

1. Follow steps 1 to 5, from section *Acting as a Travel Assistant*.

Result: You are acting on behalf of the selected Traveler and can begin booking trips as if you were the Traveler yourself.

2. Click the **Start Session** button.



3. Click on the **Travel** tab.

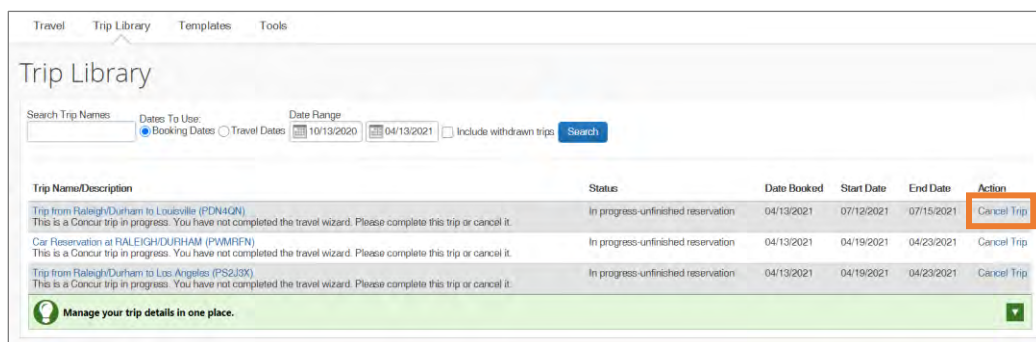
Result: Now you can begin booking travel on the Traveler's behalf, just as if you were booking travel for yourself.

Changing or Canceling a Trip

Flight changes may be available for Travelers that include a single carrier. Also, if the trip has been booked or ticketed, but has not occurred, you can change the time or date of the trip.

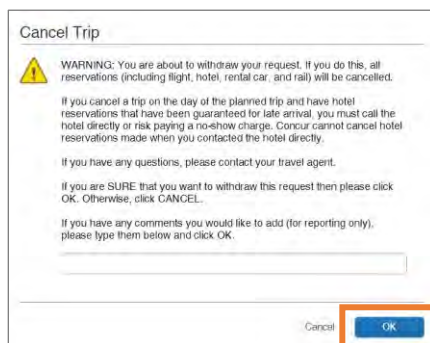
To cancel an entire trip, follow these steps:

1. Click the **Travel** tab on the Concur homepage.
 2. Click the **Trip Library** tab.
- Result:** A listing of upcoming trips will appear.
3. Click the **Cancel Trip** link next to the trip you want to cancel.



Result: A Cancel Trip pop-up message will appear.

4. Click the **Ok** button on the pop-up message.



Result: A confirmation message will appear stating that the trip has been successfully cancelled.

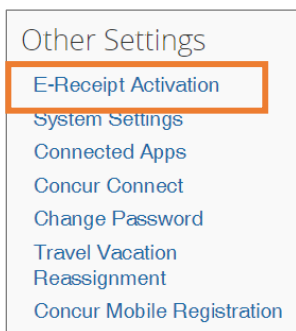
Note: If you are unable to change or cancel your Concur World Travel reservation, contact your World Travel, Inc agent for assistance.

Enabling E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor. Also, you must opt-in from your profile before e-receipts can be activated. Once activated, eligible transactions will appear in the Available Expenses section, the same way that T&E Cards transactions appear.

Important: Some vendors may require additional paperwork before they can send e-receipt data. Follow these steps to enable and activate e-receipts:

1. From the Concur home page complete either of the following:
 - a. Click **Sign up** here link.
or
 - a. Click the **Profile** link.
 - b. Click the **Profile Settings** link.
Result: You will be directed to the Profile Options page.
 - c. Select **E-Receipts Activation** (in the Other Settings section on the left-side menu).
Result: The E-Receipt Activation appears.
2. Click the **E-Receipt Activation** link.



Result: The E-Receipt Activation and User Agreement appears.

3. Click the **I Agree** button.

Result: The E-Receipts confirmation appears.

Note: Once you have accepted the user agreement, your T&E Card will be opted in as well (if applicable).

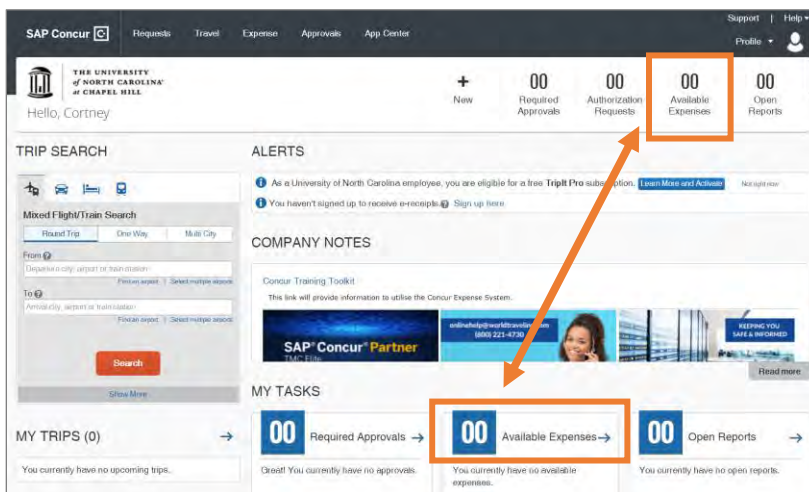
Uploading Receipts to Available Receipts

Users can choose to upload receipt images directly to the system in a supported format and view them in Available Receipts. These images are then available to that user (only) for the purpose of attaching to expense report entries.

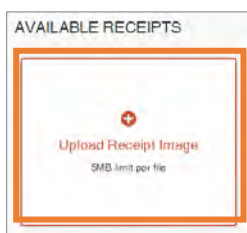
Users may also upload receipts using the Concur Mobile App. These receipts are uploaded to the Concur system automatically and can be viewed in Available Receipts. Then users can attach the receipt images at the line item expense entry level (only).

Follow these steps to upload a receipt into your available receipts:

1. Open the Manage Expense page by clicking on the **Available Expenses** tab or tile.



2. Click the **Upload Receipt Image** tile in the Available Receipts section.



Result: A pop-up window will appear for you to select the receipt to upload.

Note: The system accepts file attachments in PDF, JPG, HTML, TIF or TIFF formats.

3. Select the file to be uploaded. (These steps will vary depending on your devices operating system.)

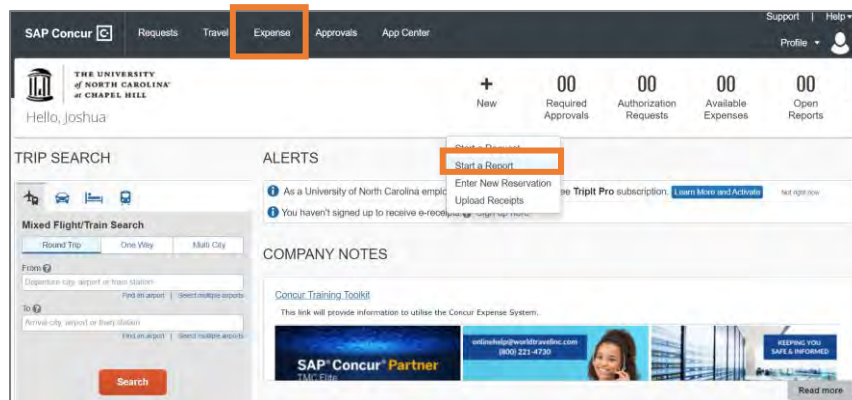
Result: The image of the receipt will appear.

Creating an Expense Report

Creating a New Expense Report without a Travel Request

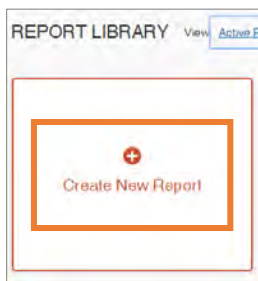
Follow these steps to create a new expense report without a travel request:

1. From the Concur home page complete the following:
 - a. On the Concur home page, place your mouse pointer over **New** on the Quick Task Bar.
 - b. Click the **Start a Report** link.or
Click the **Expense** tab.



Result: The Manage Expenses page will appear.

2. Click the **Create New Report** tile in the Report Library section.



3. On the Create a New Report page, complete all required (noted by red asterisks) and optional fields as needed.

Note: For non-overnight travel, it is considered best practice to include the business purpose of the expense report for the Report Name. For example (July, 2020 Mileage).

4. Click the **Create Report** button.

The screenshot shows the 'Create New Report' form in SAP Concur. The form includes several required fields marked with an asterisk (*). At the top, there is a 'Policy' dropdown menu set to 'UNC-General Expense Policy'. Below this, there are three columns of fields: 'Report Name', 'Report/Trip Purpose', and 'Report/Trip Start Date'. The 'Report/Trip End Date' and 'Traveler Type' fields are also present. A section for 'Does this trip include personal travel?' has a dropdown menu. Below this is an 'Additional Information' text area. At the bottom, there are fields for 'Business Unit', 'Dept ID', and 'Fund', each with a 'Search by Code' dropdown. A 'Source' dropdown is located at the bottom left. In the bottom right corner, there is a 'Cancel' button and a 'Create Report' button, which is highlighted with a red rectangle.

Creating a New Expense Report from a Travel Request

You can create an expense report from an approved travel request. Follow these steps to create a new expense report from a travel request:

1. Open the Active Requests page by clicking on the **Requests** tab.

The screenshot shows the SAP Concur interface with the 'Requests' tab selected. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The 'Requests' tab is highlighted with a red rectangle. The main content area displays a 'TRIP SEARCH' section with a 'Mixed Flight/Train Search' form. To the right, there are 'ALERTS' and 'COMPANY NOTES' sections. At the bottom, there is a 'MY TASKS' section with three cards: 'Required Approvals', 'Available Expenses', and 'Open Reports'. Each card shows a count of zero and a link to view more. The 'Open Reports' card is highlighted with a red rectangle.

Result: The Active Requests page will appear.

2. Select the Travel Request you want to create an expense report for.

Manage Requests View: Active Requests

Create New Request

APPROVED 08/03/2020

MINT Conference

\$1,167.50

Approved

3. Click the **Create Expense Report** button.

MINT Conference \$1,167.50

Approved Request ID: 33GE

Request Details Print/Share Attachments

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Tulsa, Oklahoma	08/03/2020	\$500.00	\$500.00
Air Ticket	Raleigh (RDU) - Tulsa (TUL) : Round Trip	08/03/2020	\$475.00	\$475.00
Daily Allowance	Tulsa, Oklahoma	08/03/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

More Actions Create Expense Report

Result: All Report Details of the approved Travel Request will populate on the Expense Report.

MINT Conference \$0.00

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST

Approved \$1,167.50

Add Expense Edit Delete < Back > Forward < Submit Expense > Cancel

No Expenses

Add expenses to this report to submit for reimbursement.

4. Then continue to follow the steps noted for adding available expenses.

Adding Available Expense Transactions

On the Concur home page, you can view a list of unassigned T&E card transactions, Airfare Direct Bill transactions, and E-Receipts in the Available Expenses section. Also, for Available Expenses, some of the expense types may automatically populate based on the merchant or transaction type. These transactions must be reviewed and edited as necessary to ensure the correct account code is assigned and the correct expense form is completed.

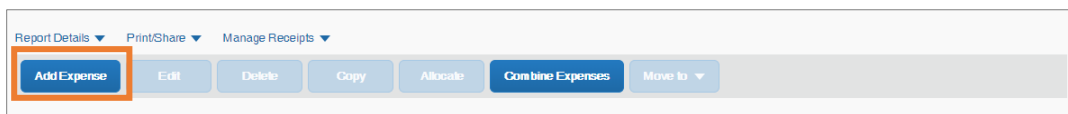
Note: The payment type for T&E Card transactions and Airfare Direct Bill transactions will automatically be assigned and cannot be changed.

When using your T&E Card for purchases in a foreign currency, Bank of America will assess an International Transaction Fee. These fees will appear as separate transactions under Available Expenses and should be included on the same Expense report as the T&E Card expenses which they are related to. No receipt is required when reconciling the expense.

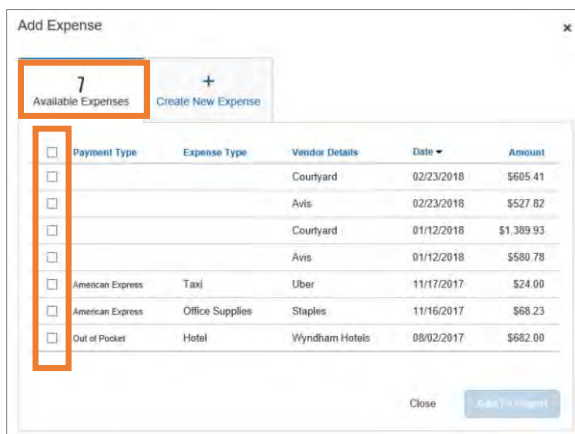
From an open expense report

Follow these steps to add available transactions within an open report:

1. Click the **Add Expense** button.



2. From the Available Expenses tab, select the check box(es) for the appropriate expenses you want to assign to the current expense report.

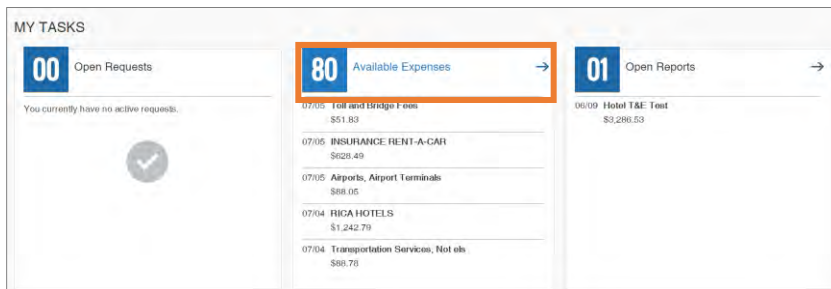


3. Click the **Add to Report** button.

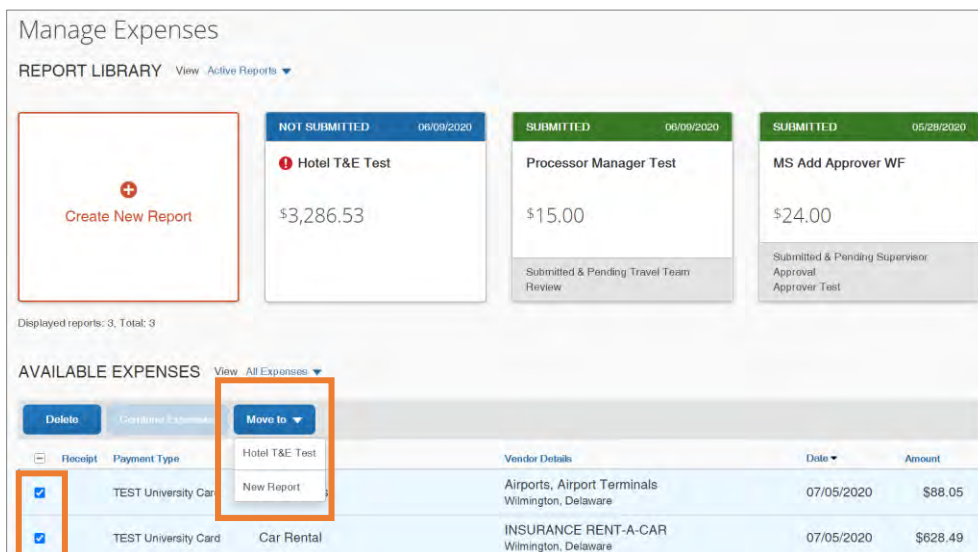
From the Available Expense section

Expenses listed in the Available Expense section can be added to an existing expense report or used to create a new expense report. Follow these steps to assign transactions to a report from the Available Expenses section:

1. Click the **Available Expenses** tile in the My Task section of the Home page.



2. From the Available Expenses section (you might need to scroll down) mark the checkbox next to the Available Expense(s) you want to add to an existing expense report or new report.
3. Click the **Move to** button.
4. Select the Expense Report you want to add the Available Expense(s) to or select New Report to create a new report.



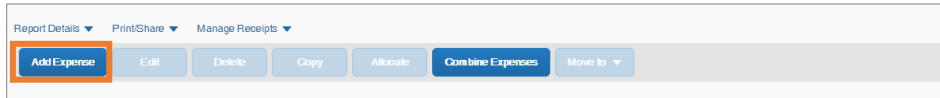
Result: Depending on the action you select; one of two results will occur:

- a. If you selected an existing report, the report opens, and the Available Expense transaction is added to the report.
- b. If you selected **New Report**, the Create New Report page appears. Enter the report information as usual.

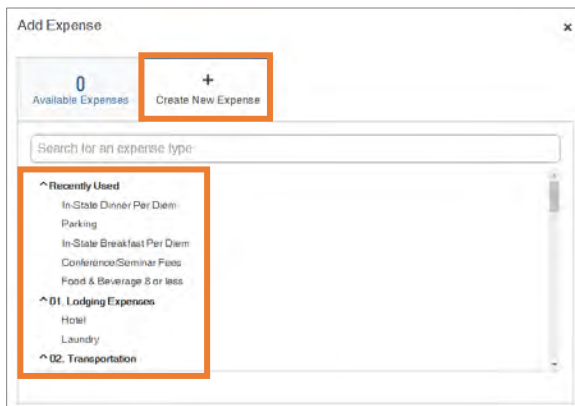
Adding Out-of-Pocket Expenses

Follow these steps to add out-of-pocket expenses to a report:

1. From the open report, click the **Add Expense** button.



2. Click the **Create New Expense** tab.
3. Search for or select the appropriate expense type from the list.



Result: The New Expense page appears displaying the required and optional fields for the selected expense type. The Expense Type field, Traveler Type, Trip Type, and Report/Trip Purpose are all automatically populated on the New Expense page.

4. Complete the required (noted by red asterisks) and optional fields.
5. Select **Out of Pocket**, from the Payment Type dropdown menu.
6. Click the **Attach Receipt Image** icon to upload and/or attach the receipt.

A screenshot of the 'New Expense' form. The form has two tabs: 'Details' (selected) and 'Itemizations'. The 'Details' tab contains several fields: 'Expense Type' (set to 'Parking'), 'Transaction Date' (MM/DD/YYYY), 'Traveler Type' (Faculty/Staff), 'Trip Type' (Out-of-State), 'Report/Trip Purpose' (Conference), 'Payment Type' (set to 'PLEASE SELECT PAYMENT TYPE' and highlighted with an orange box), 'Amount', 'Currency' (US Dollar), and a 'Comment' field. On the right side of the form, there is a large box with a red plus icon and the text 'Attach Receipt Image', which is also highlighted with an orange box. At the bottom of the form are buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'.

Note: If the expense requires itemization, click the Itemization tab.

7. Click the **Save Expense** button.

Allocating Expenses

As you create an expense report, you can allocate expenses to different projects or departments. You can allocate one expense, multiple expenses, or an entire expense report as needed.

Note: Allocations may adjust the approval workflow of the report, depending on the chartfield strings used.

Allocating an Expense

Follow these steps to allocate expenses on an expense report:

1. Complete one of the following set of steps to get started:

Allocating an Existing Expense

- a. Open a current Expense Report.
- b. Select the checkbox for the expense(s) you want to allocate.
- c. Click the **Allocate** button.

The screenshot shows the SAP Concur Fusion interface for an expense report titled "SAP Concur Fusion \$320.00". The report is marked as "Not Submitted". At the top right are "Copy Report" and "Submit Report" buttons. Below the title, there are tabs for "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". A "REQUEST" section shows an "Approved" amount of "\$475.00". A row of action buttons includes "Add Expense", "Edit", "Delete", "Copy", "Allocate" (highlighted with an orange box), "Combine Expenses", and "Move to". Below these buttons is a table with columns: Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains two rows: one for "University Paid by PCard" (Food & Beverage 8 or less, \$300.00) and another for "Out of Pocket" (Parking, \$20.00). The "Out of Pocket" row has a checkbox selected (highlighted with an orange box). The total amount at the bottom right is "\$320.00".

Result: The Allocate pop-up window will appear.

Allocating a New Expense

- a. Open a current Expense Report.
- b. Click the **Add Expense** button.
- c. Complete the required and necessary fields.
- d. Click the **Allocate** link.

The screenshot shows the "Allocate" pop-up window. It has two tabs: "Details" and "Itemizations". The "Details" tab is active. It shows "Attendees (3)" and an "Allocate" button (highlighted with an orange box). Below this is a dropdown menu for "Expense Type *" with "Food & Beverage 8 or less" selected. A note indicates that the asterisk (*) denotes a required field.

Result: The Allocate pop-up window will appear.

2. Select the **Percent** or **Amount** tab.

- Click the **Add** button.

The screenshot shows the 'Allocate' window with the 'Percent' tab selected. The 'Amount' field is set to \$20.00, and the 'Percent' field is set to 100%. The 'Code' field contains 'UNCCH-412017-20100-12106'. The 'Add' button is highlighted with an orange box.

- Enter the appropriate chartfield string information or select an allocation from your Favorite Allocations Tab.
- Click **Add to List** button

The screenshot shows the 'Add Allocation' window with the 'Favorite Allocations' tab selected. The 'Business Unit' is '(UNCCH) University of North Caroli' and the 'Dept ID' is '(412017) Pediatrics-Infectious Dis'. The 'Add to List' button is highlighted with an orange box.

- Modify the percent or amount for the allocation by percent or by amount.

Allocating by Percent - Enter the Percent of what you want to allocate to the designated chartfield string.

The screenshot shows the 'Allocate' window with the 'Percent' tab selected. The 'Amount' field is set to \$20.00, and the 'Percent' field is set to 100%. The 'Code' field contains 'UNCCH-412017-20100-12106'. The 'Add to List' button is highlighted with an orange box.

Note: The total percentage of the lines must equal 100 percent.

Allocating by Amount - Enter the Amount of what you want to allocate to the designated chartfield string.

Allocate
Expenses: 1 \$20.00

Percent Amount

Amount \$20.00 Allocated 100% \$20.00 Remaining 0% \$0.00

Default Allocation
Code UNCH-412017-20100-12106 Amount USD \$0.00

Add Edit Remove Save as Favorite

Business Unit	Dept ID	Fund	Source	Project ID	PC Business Unit	PC Activity ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Costs	Amount USD
Arts & Sciences Foundation	Arts and Sciences Foundation	Acad Affairs - Reg Term Inst	Academic Affairs Educ & Tech								CHASR-300101-20101-12000	15.60
University of North Carolina-Chapel Hill	Pediatrics-Infectious Diseases	Acad Affairs - Gen Fund Ctl	AA-App/Cert/Rel Budget Pool								UNCH-412017-20100-12000	4.40

Cancel Save

Note: The total amounts of the line must equal the total amount of the expense(s).

- Continue to click the **Add** button and follow the steps to add additional distribution lines for allocation until the amount equals the total amount of the expense(s) or the percent total is 100.
- Click the **Save** button.

Allocate
Expenses: 1 \$20.00

Percent Amount

Amount \$20.00 Allocated 100% \$20.00 Remaining 0% \$0.00

Default Allocation
Code UNCH-412017-20100-12106 Amount USD \$0.00

Add Edit Remove Save as Favorite

Business Unit	Dept ID	Fund	Source	Project ID	PC Business Unit	PC Activity ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Costs	Amount USD
Arts & Sciences Foundation	Arts and Sciences Foundation	Acad Affairs - Reg Term Inst	Academic Affairs Educ & Tech								CHASR-300101-20101-12000	15.60
University of North Carolina-Chapel Hill	Pediatrics-Infectious Diseases	Acad Affairs - Gen Fund Ctl	AA-App/Cert/Rel Budget Pool								UNCH-412017-20100-12000	4.40

Cancel Save

Result: The expense will display as Allocated on the expense report page.

Continue to allocate until the total allocated percentage is 100 or the amount balances.

For more details on adding different types of expenses, refer to section 12 of the Step-By-Step Guide.

Submitting an Expense Report

After reviewing your expenses and attaching your receipts, you will need to submit your expense report. If you are acting as a personal delegate and creating an Expense Report on behalf of another user, you will not have the option to submit the expense report. Delegates can prepare the expense report, then use the Notify feature to alert the traveler when the expense report is ready to be submitted. Follow these steps to submit an expense report:

1. From the manage expenses page, open the expense report you want to submit.
2. Click the **Submit Report** button.

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Daily Allowance	Charlotte, North Carolina	05/03/2020	\$27.00
<input type="checkbox"/>	Out of Pocket	Daily Allowance	Charlotte, North Carolina	05/02/2020	\$41.00
<input type="checkbox"/>	Out of Pocket	Daily Allowance	Charlotte, North Carolina	05/01/2020	\$27.00
					\$95.00

Result: A UNC-User Submit Agreement pop-up window will appear.

3. Click the **Accept & Continue** button.

*UNC-User Submit Agreement:

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for The University of North Carolina at Chapel Hill and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment, if payment is received from another source for any portion of the expenses claimed, or if it is determined that I owe the University money as a result of this claim, I hereby authorize The University of North Carolina at Chapel Hill to deduct the amount from the wages I will receive via payroll.

Cancel **Submit Report**

Result: A Report Totals pop-up window will appear. This displays the total amounts, the amount the University (company) will pay, and/or how much the employee owes the University.

4. Click the **Submit Report** button.

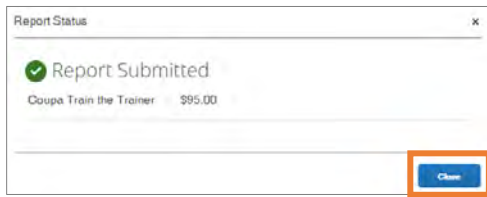
Report Totals

Company Pays: \$95.00	Employee Pays: \$0.00
Amount Total: \$95.00	Due Employee: \$0.00
Requested Amount: \$95.00	Due Company: \$0.00
Total Paid By Company: \$95.00	Total Owed By Employee: \$0.00

Cancel **Submit Report**

Result: A Report Status pop-up window will appear.

5. Click the **Close** button.

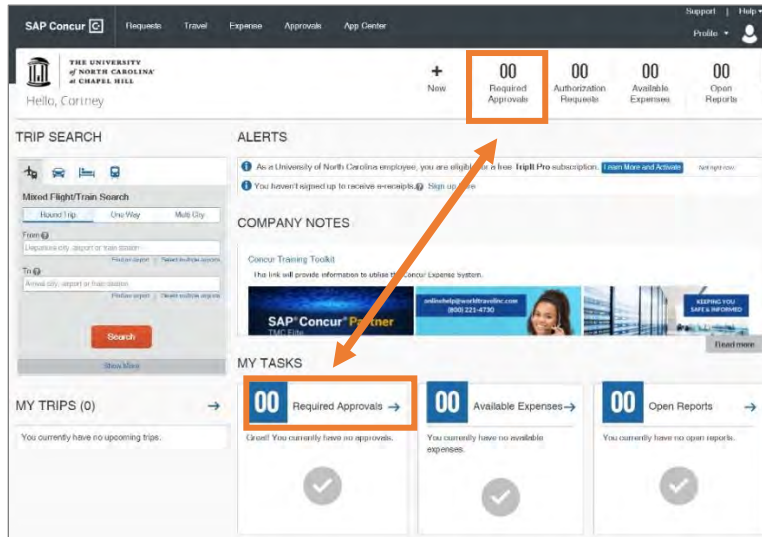


Result: The report is submitted, and the status is listed in the Active Reports list.

Approving Expense Reports

Follow these steps to approve an expense report:

1. Click the **Required Approvals** tile or tab.



Result: The Approvals page will appear.

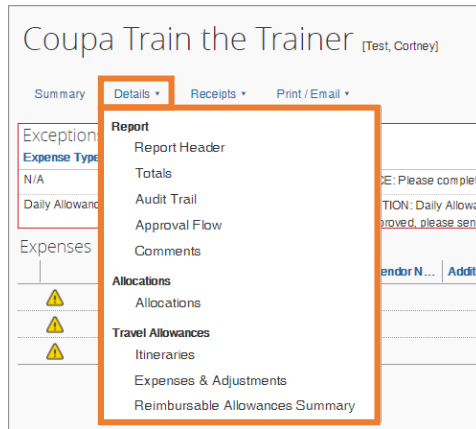
2. Click on the Report Name that you want to review for approval.

The screenshot shows the 'Approvals' page. The 'Expense Reports' section is active, and the 'Report Name' column is highlighted with an orange box. The table lists three expense reports:

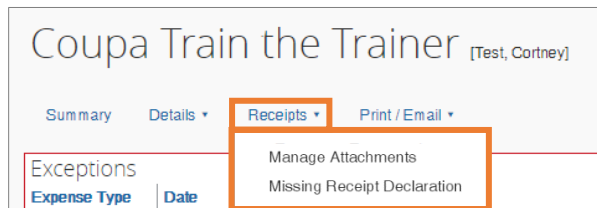
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Cruise Train the Trainer	Test, Coriney	05/19/2020	\$95.00	\$95.00
Learning up Launch Address	Test, Traveler1	05/15/2020	\$0.00	\$700.00
ATD Conference	Test, Coriney	03/09/2020	\$248.10	\$248.10

Result: The Summary expense report will appear.

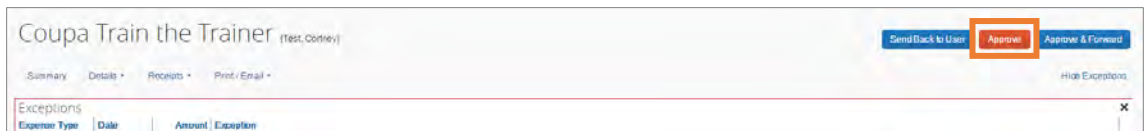
3. Click on the following to review the expense:
 - a. **Details** – This link dropdown option will display various elements of the expenses included in the report.



- b. **Receipts** – This link dropdown option will allow you to review attached receipts and add receipts if necessary.



4. Click the **Approve** button, to certify that you have reviewed the report and it is in compliance with University policies.



Result: A Final Confirmation pop-up window will appear.

5. Click the **Accept** button.



Result: The Expense Report is approved and will no longer be shown on your list of Pending Reports.

Signing into the Concur Mobile App

The Concur Mobile App allows you to keep track of your expenses from your mobile device.

With the app you can:

- Upload receipts.
- Review and approve expense reports.
- Itemize hotel charges.
- And more.

Begin by downloading the Concur Mobile application to your device. You will use the Single Sign On (SSO) method along with your ONYEN Username and Password to complete the sign in process.

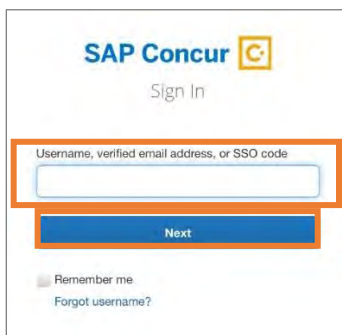
Important: Do not create your own account. You must access your account using your ONYEN.

Follow these steps to sign into the mobile app:

1. Download the app to your device.
2. Open the Concur Mobile App.
3. Enter your ONYEN@unc.edu as the username.

Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.

4. Tap the NEXT button.



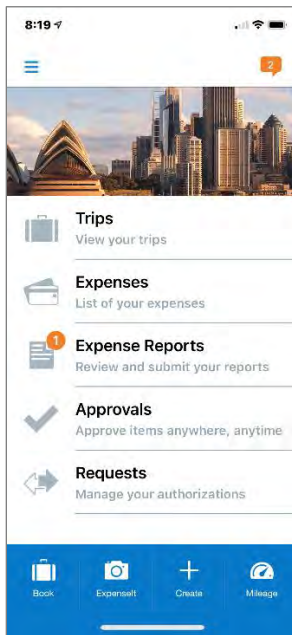
5. Tap the **Sign in with UNC SSO** button.



6. On the UNC-CH Single-Sign On screen, enter your ONYEN and password.

7. Tap the **Sign In** button.

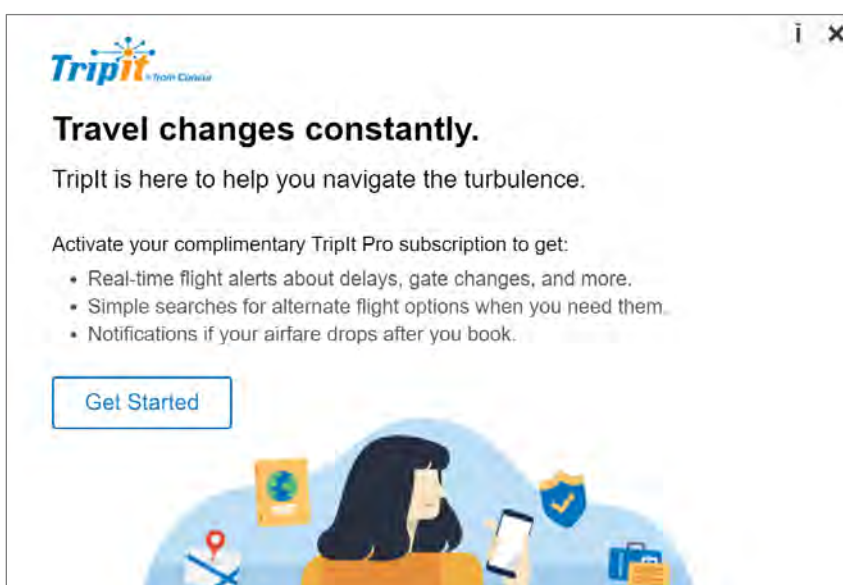
Result: You will see the Home screen of the app. From here you can perform many actions that you would normally complete using a computer.



Using TripLink

TripLink utilizes My Travel Network, and Triplt Pro app to help you organize and manage your travel bookings and receipts. It is an extended service that the University has purchased for all UNC-CH Concur system users.

- **My Travel Network** - Leverages reward programs with Concur's connected travel partners to bring receipts directly into your Concur Expense profile.
- **Triplt Pro** - This app helps you organize your travel plans and receive real-time alerts and helpful reminders throughout your trip. To activate your Triplt Pro Subscription you must create a Triplt Account using your UNC-CH email address before using the app.



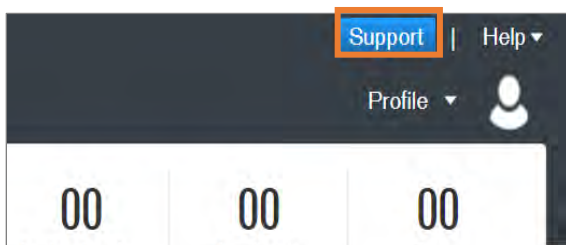
To learn more about TripLink, enroll, and/or activate My Travel Network or Triplt Pro click the App Center on the banner in the Concur system or visit [Concur's Travel Made Easy webpage](#).

Resources for Help and Support

Concur User Support Desk

The Concur User Support Desk service provides supplemental support to users with Concur as the first point of contact. You can contact Concur regarding application questions, service requests, or for incidents involving unexpected behavior of any Concur software. You can also use this service to help accomplish a task in Concur. A Concur representative will provide direct support and be familiar with UNC-CH's specific system configuration and capabilities built around the University's policies. Follow these steps to contact the Concur User Support Desk:

1. Log into the Concur System
2. Click the **Support** link.



Result: You will be redirected to the Customer Support Site.

Training and Other Materials

Computer-based training (CBT) and quick reference cards (QRC's) are available to provide additional guidance on completing various task in the Concur system. Please visit the [UNC-CH Concur webpage](#) to gain access to trainings and additional reference materials.