UNC | FINANCE AND OPERATIONS
Finance and Budget

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/

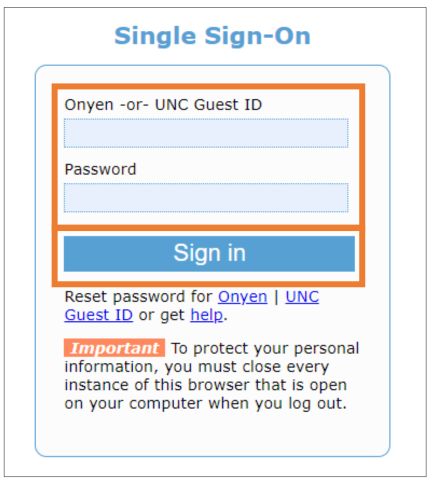
Signing into Concur

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.



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

Via ConnectCarolina

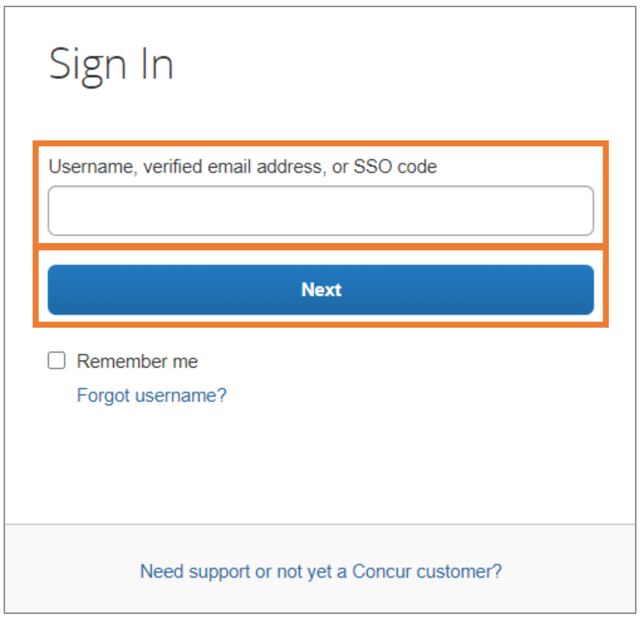
1. Go to https://connectcarolina.unc.edu/ by entering it into your internet browsers address bar.
2. Click the **Log In** button.
3. Complete the Single Sign-On (SSO) by entering your ONYEN username, password, and Duo Authentication.
4. Click the **Concur** link from the Admin WorkCenter, Self Service 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 concursoultions.com. After navigating to concursolutions.com, follow these steps to login:

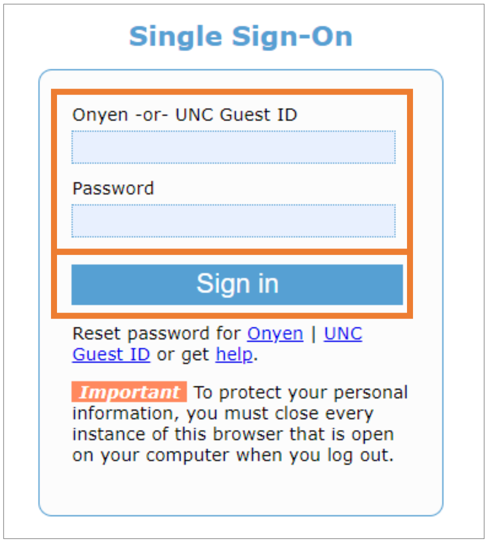
1. Enter your username as your ONYEN@unc.edu.
   Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.
2. Click the **Next** button.



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

   Result: You will be taken to the UNCCH Single Sign-On page.
4. Enter your **ONYEN** and **Password**.

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



Result: You will be prompted to complete Duo Authentication.

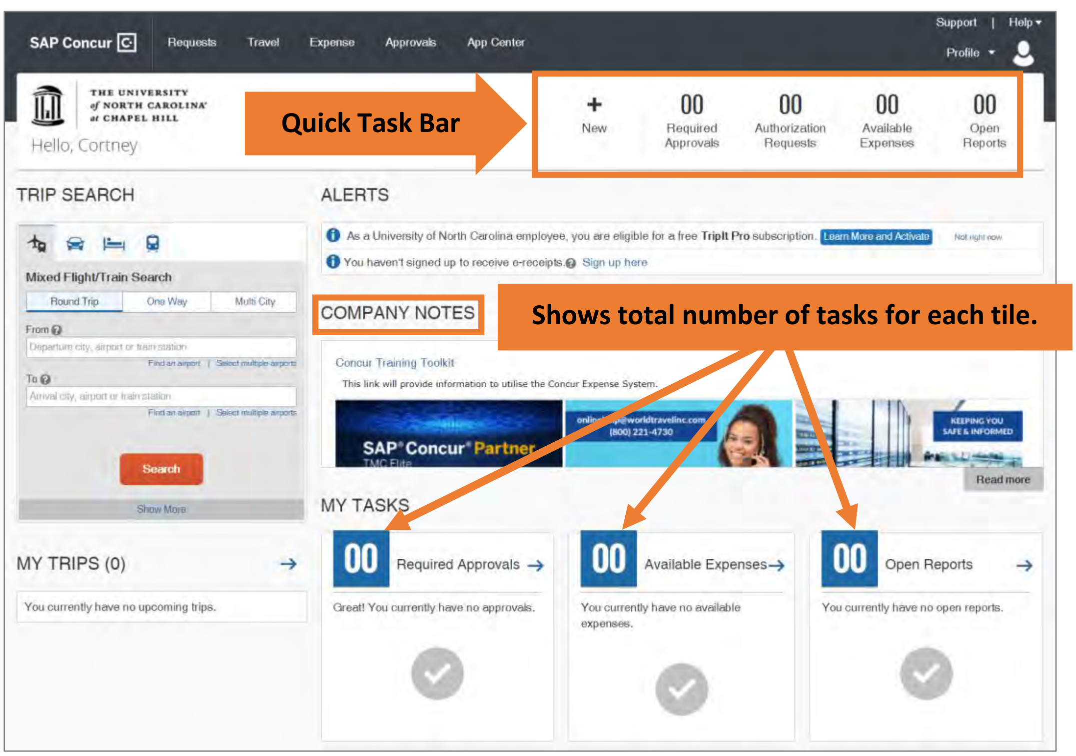
6. Complete the Duo Authentication.
7. **Result:** You will arrive at the Concur homepage.

   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: • Start a new report or request • Open reports and requests • Manage available expenses • Manage approvals
My Tasks	This section shows: • **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.



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.

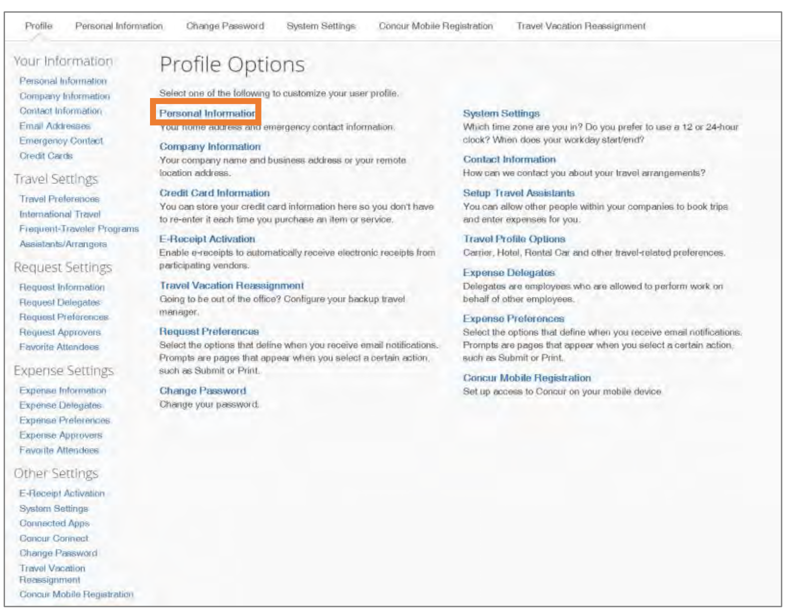
Options	Description
Your Information	Select personal information, work address, home address, contact information, and verify email address.
Request Settings	Select request information, add or remove delegates, enter email preferences, select approvers, and add or remove attendees.
Expense Settings	Select 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.

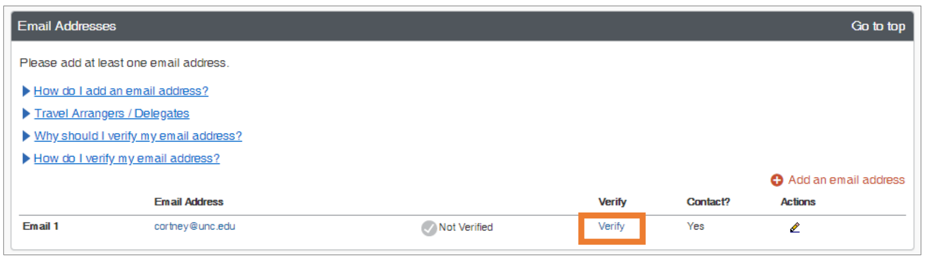
   Result: You will be directed to the Profile Options page.
3. On the Profile Options page, review the **Your Information** section, and select the appropriate links to update your profile information.



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.

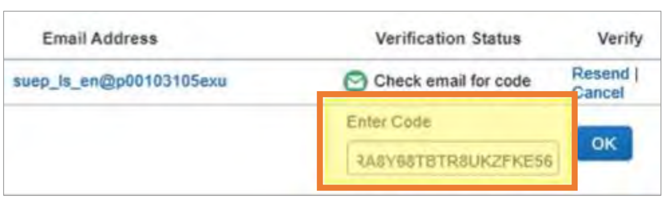


   Result: An alert message will appear.

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.

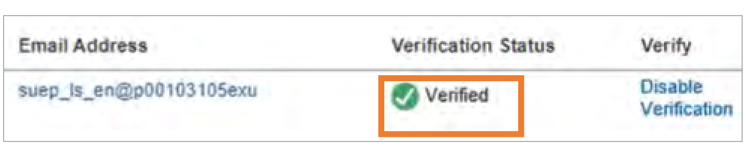


7. Click the **OK** button.

   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.



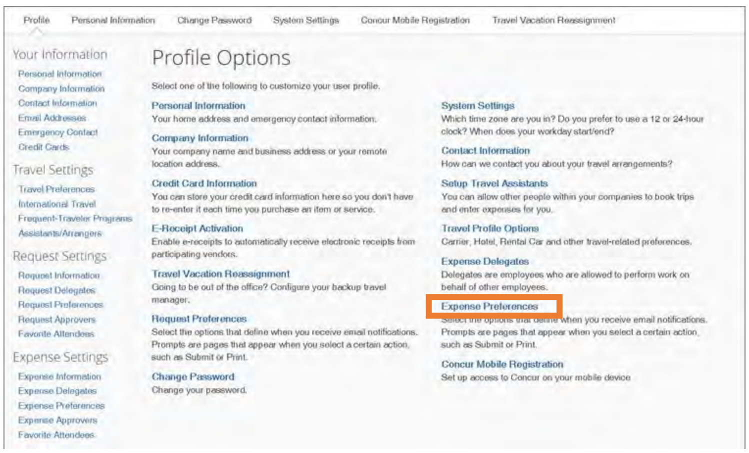
Using Expense Assistant

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.

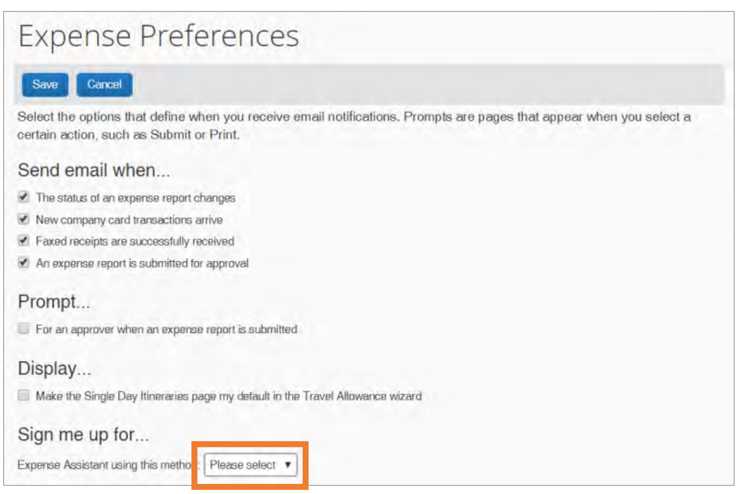
Enabling Expense Assistant

Follow these steps to enable Expense Assistant:

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



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



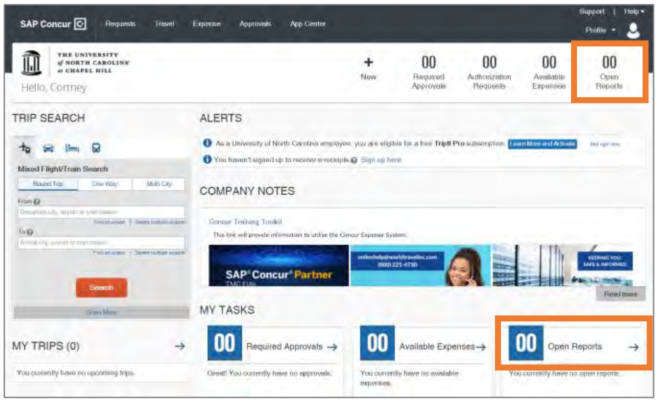
5. Click the **Save** button.

   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.

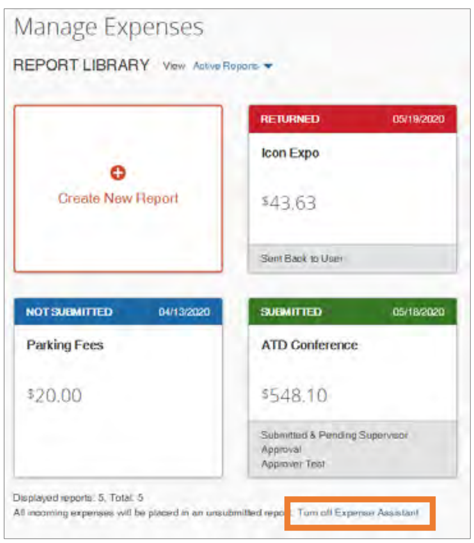
Disabling Expense Assistant

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.

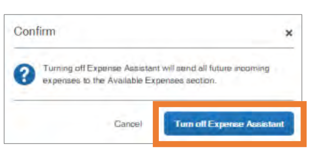


2. Click the **Turn off Expense Assistant** link.



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.

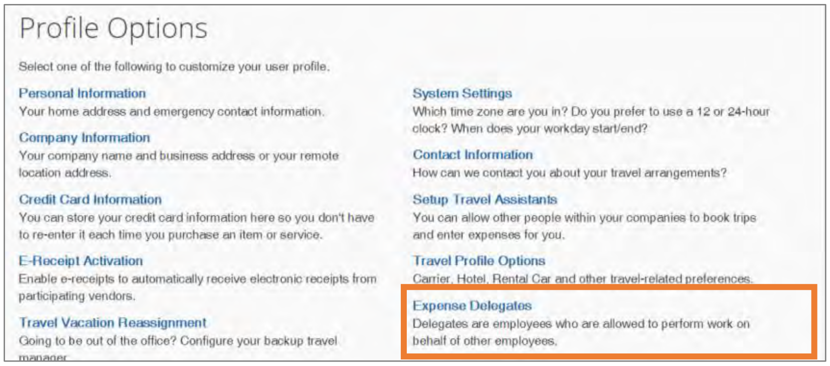
Delegates may be managed and assigned through the Request Delegates link on the Profile Options page or by following the steps below to access the Expense Delegates link. Regardless of the navigation path chosen, Delegates will have the same access in Request and Expense.

Creating a Delegate

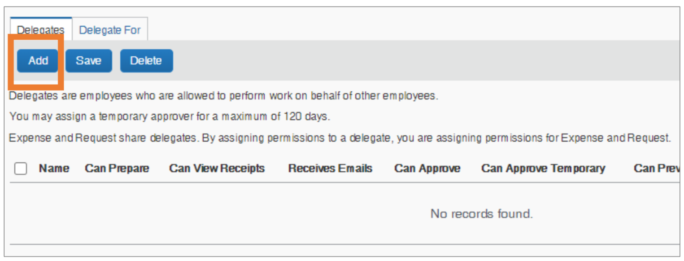
Follow the steps below to create a delegate:

1. Click the **Profile** link.
2. Click the **Profile Settings** link.
   Result: You will be directed to the Profile Options page.

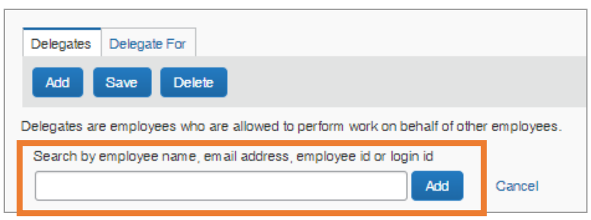
3. Click the **Expense Delegates** link.



4. Click the **Add** button.



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



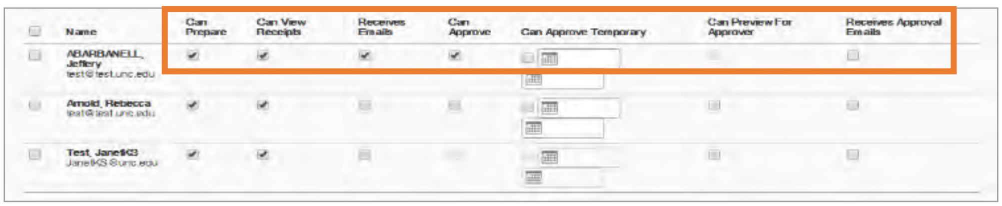
6. Click on the employee you wish to add as a delegate.
7. Select the task(s) you want to delegate or perform on your behalf and what notifications they should receive.

   Personal Delegate Options:

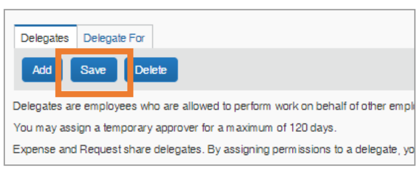
   - **Can Prepare** – This allows the delegate to prepare requests or expenses on your behalf.
   - **Can View Receipts** – This allows the delegate to view receipts that are uploaded to your account in the Concur system.
   - **Receives Emails** – This allows the delegate to receive the same email notifications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



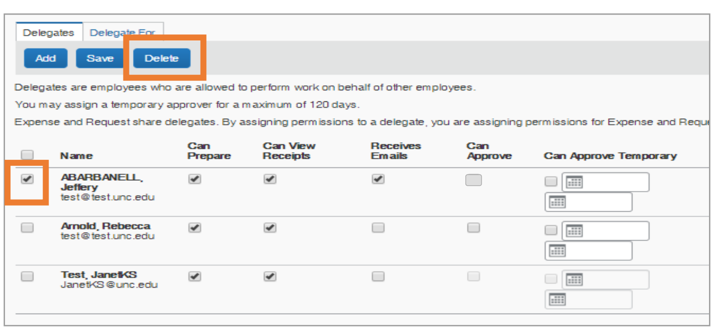
8. Click the **Save** button.



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.



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.

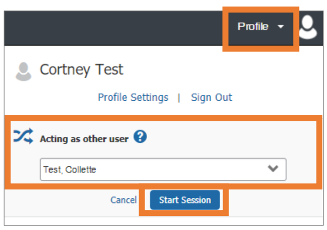
   Result: The system will delete the delegate you selected.

Acting as a Delegate

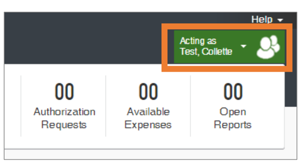
If you have been assigned to work as a delegate, your delegators will define which task(s) you can complete, such as preparing reports or approving on their behalf.

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.

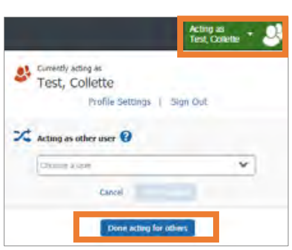


   Note: To select a different user, follow the same steps but select a different name.

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.

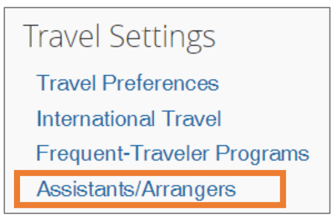


Creating a Travel Assistant

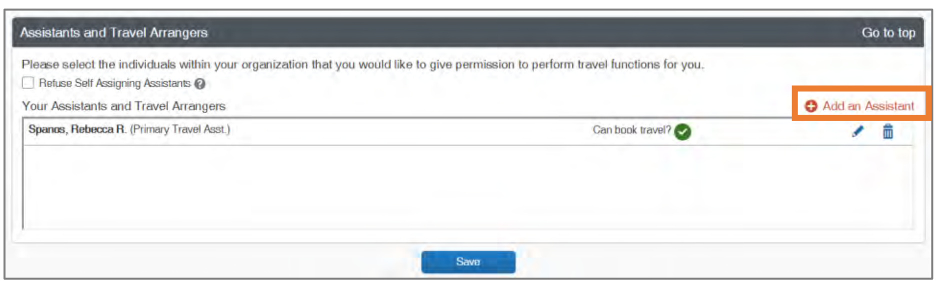
A Traveler can assign a Travel Assistant (Arranger) to manage their travel activities including, booking, canceling, and changing trip information. A Traveler can choose an arranger in the Profile section. Follow these steps to create a Travel Assistant:

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.



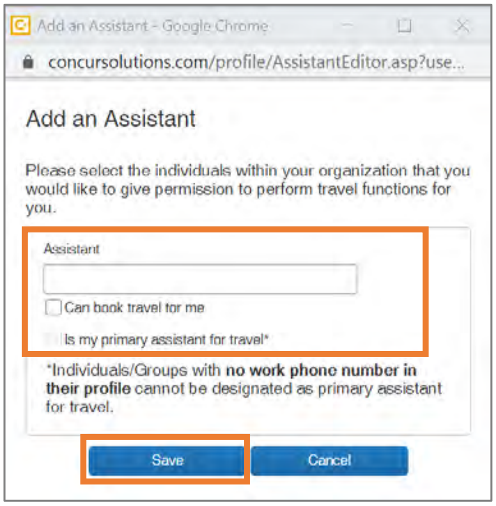
4. Click the **Add an Assistant** link.



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

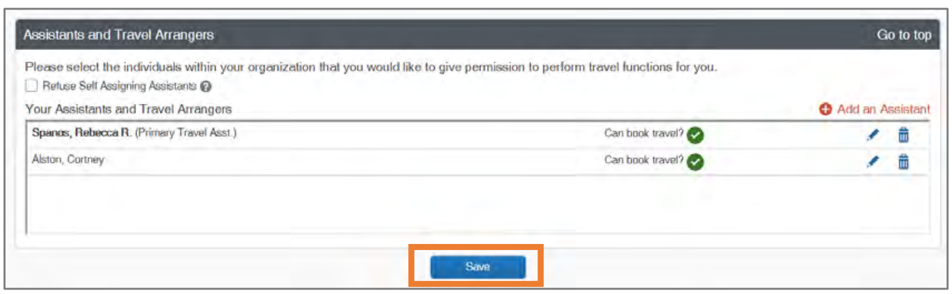
5. In the Assistant field, enter the name of the individual(s) you would like to be your Travel Assistant.
6. Mark the checkbox for **Can book travel for me.**
7. Mark the checkbox **Is my primary assistant for travel**, if applicable.

8. Click the **Save** button.



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

9. Click the **Save** button.



Deleting a Travel Assistant

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

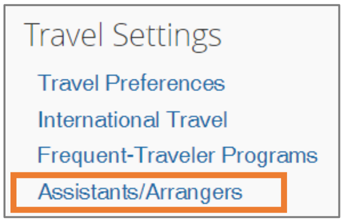
If you are the Traveler

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

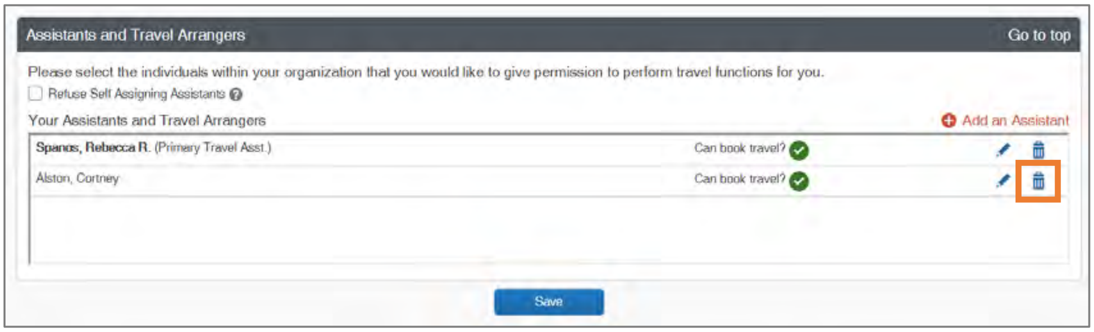
1. Click the **Profile** link.
2. Click the **Profile Settings** link.

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

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

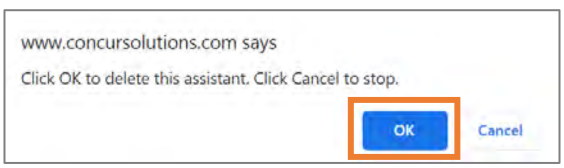


4. Click the **Trashcan** icon beside the individual(s) you want to delete.



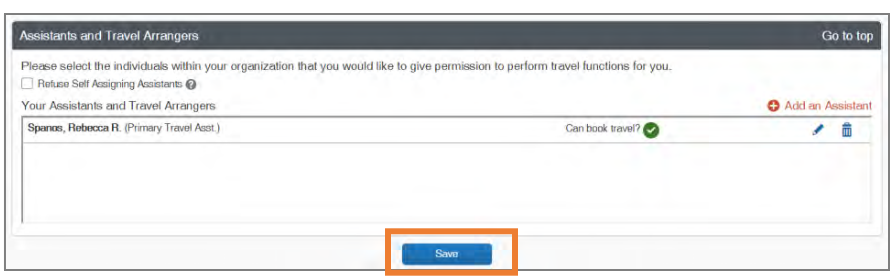
Result: A pop-up confirmation message will appear.

5. Click the **OK** button.



Result: The Travel Assistant is deleted from the listing.

6. Click the **Save** button



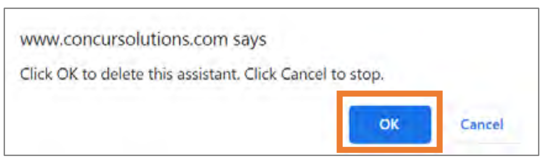
If you are a Travel Assistant/Arranger

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.

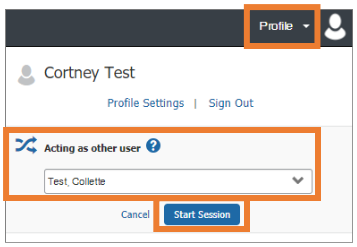
Acting as a Travel Assistant

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:

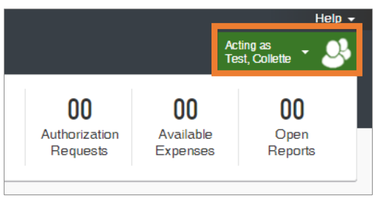
- Book flight, rental car, hotel, etc.
- View upcoming trips
- Manage trips actions such as change or cancel a trip for a traveler,
- View/Filter travelers by name or date of traveler
- View trip segment information without having to access the full itinerary
- Access the airline's check-in webpage to 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.

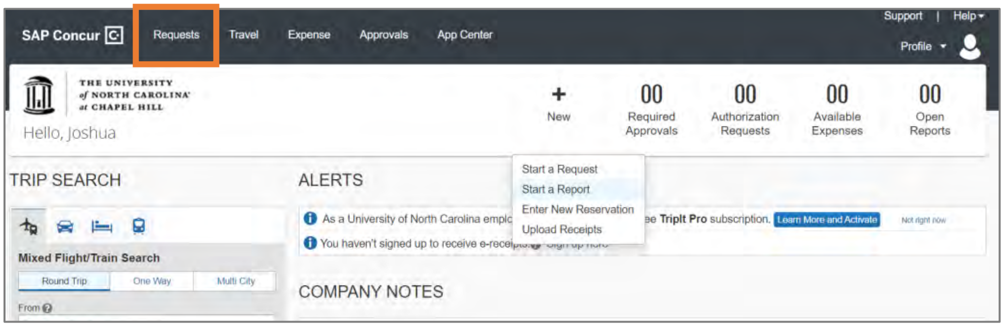
Creating a Travel Request

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.

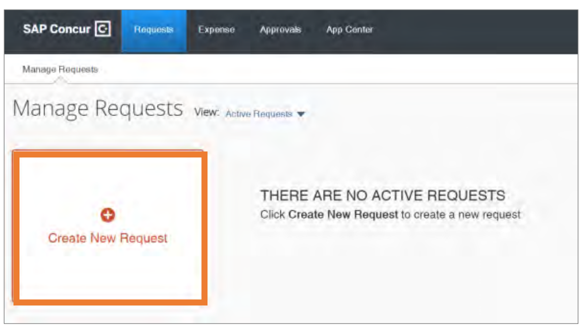
Creating a New Travel Request

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)

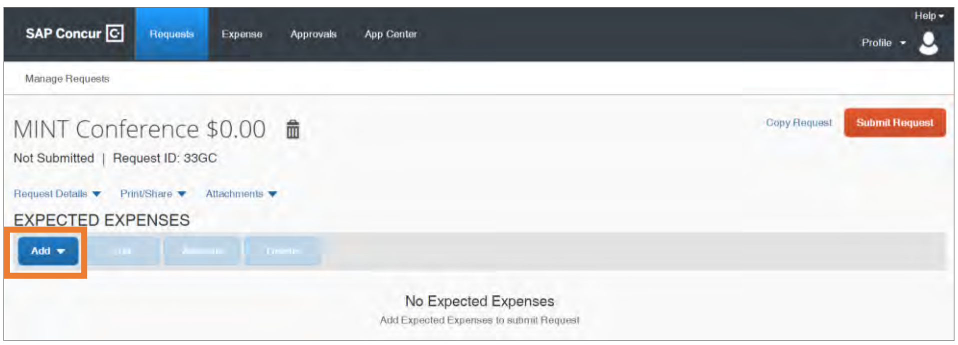
If the travel request will include personal travel it should be documented when creating and submitting the request.

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

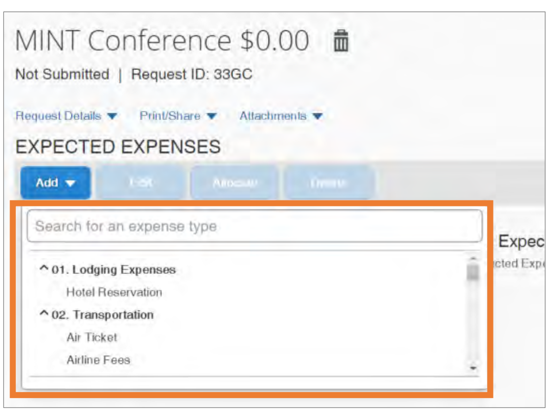
Adding Expenses to a Travel Request

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.



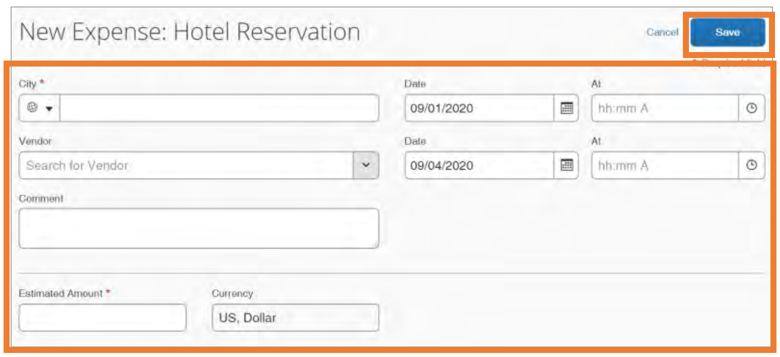
8. Select the type of expense you need to add.



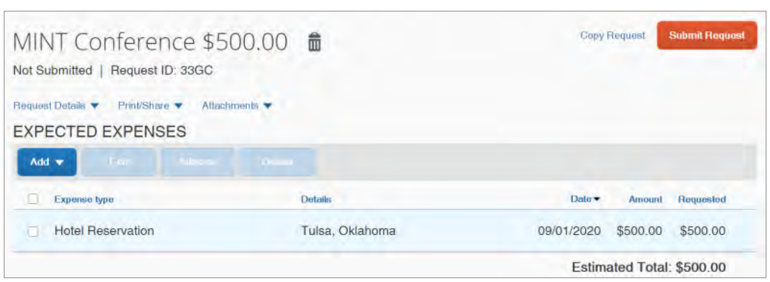
Adding Lodging Expenses to a Travel Request (if applicable)

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.



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

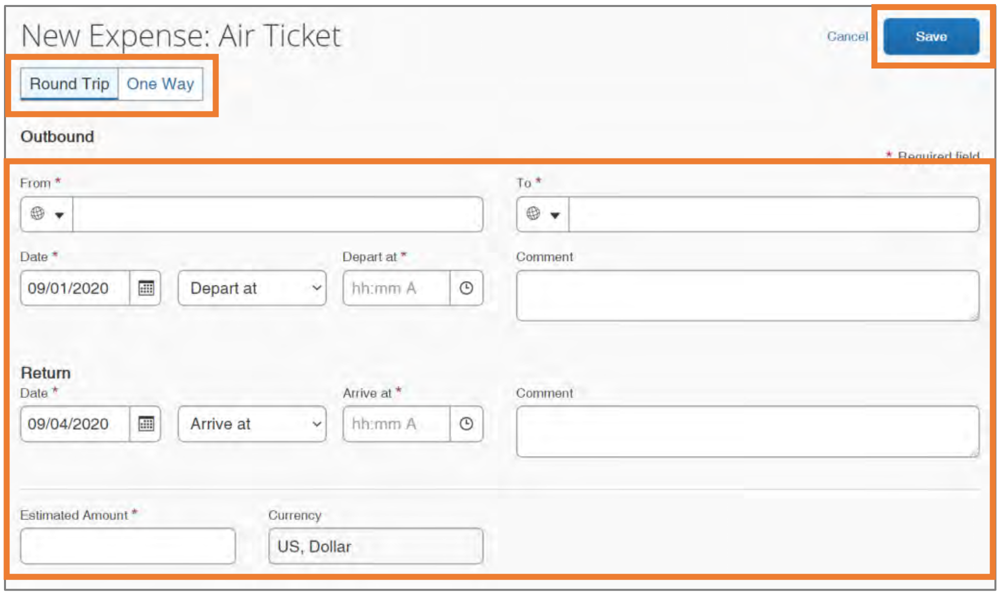


11. If you need to add another anticipated expense, click the **Add** button.
    If you are done adding anticipated expenses, click the **Submit Request** button.

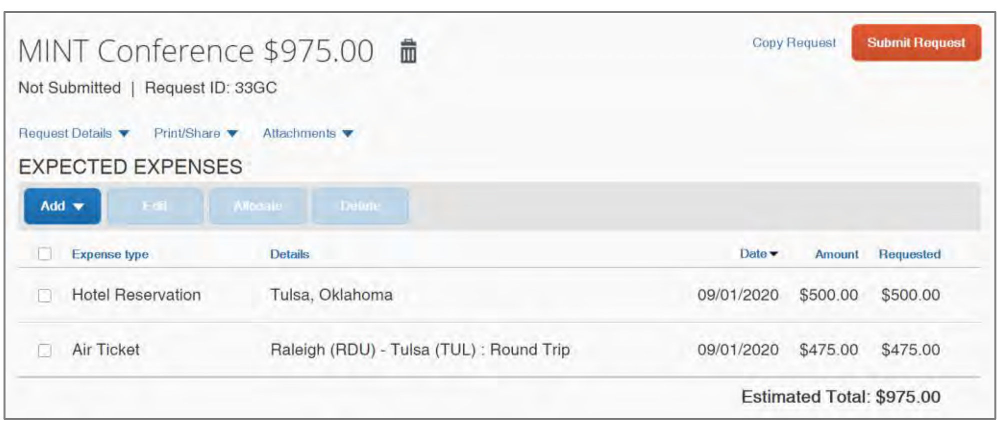
Adding Air Ticket Transportation to a Travel Request (if applicable)

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.



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



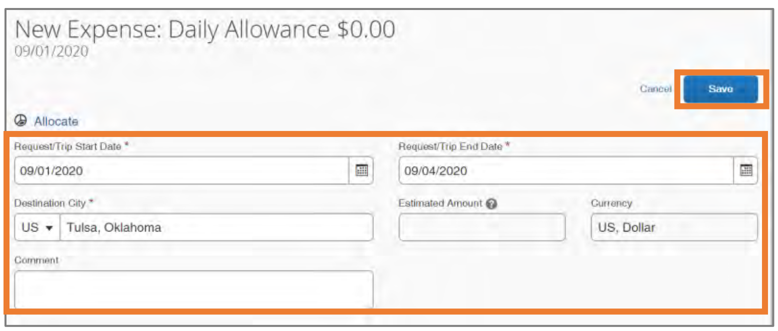
15. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

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:

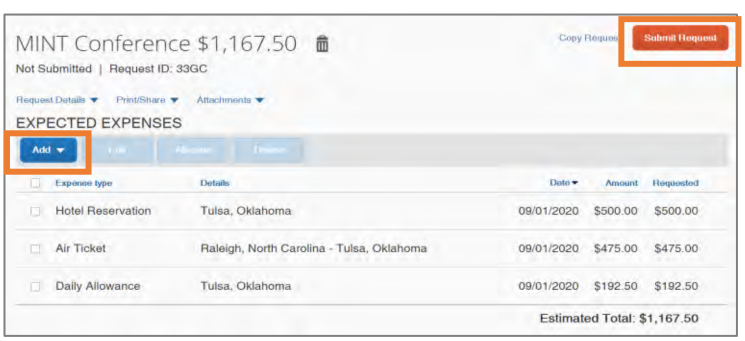
16. Enter the required (noted by red asterisks) and necessary optional fields.
    Note: The Trip Start Date, Trip End date, and Destination City will automatically be added based on the Request Header. Also, the Estimated Amount will automatically calculate once you click the Save button. The Estimated 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.



    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.



Adding a Travel Cash Advance Request

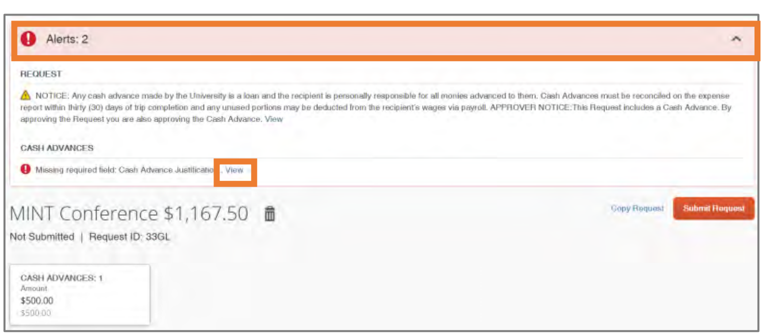
To request a cash advance, you must include the request when you are creating a travel request. This feature will not automatically be enabled and is typically only available for international travel. Contact the [UNC Travel Office] if you believe you need access to Travel Cash Advances. Follow these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

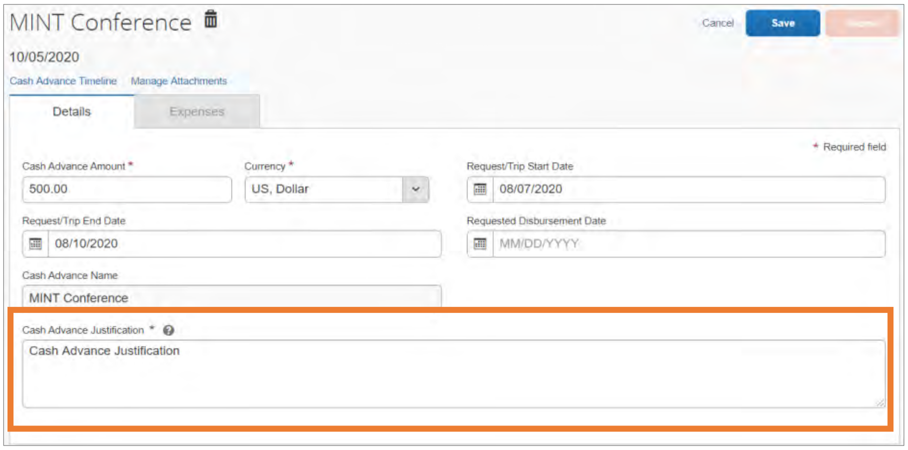
Result: The New Cash Advance popup window will appear.

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

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



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.



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

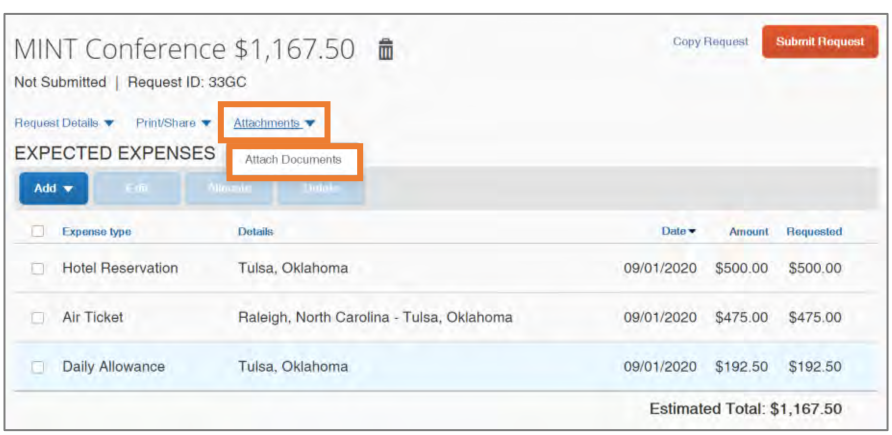
9. Click the **Save** button.

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

Adding Attachments to a Travel Request

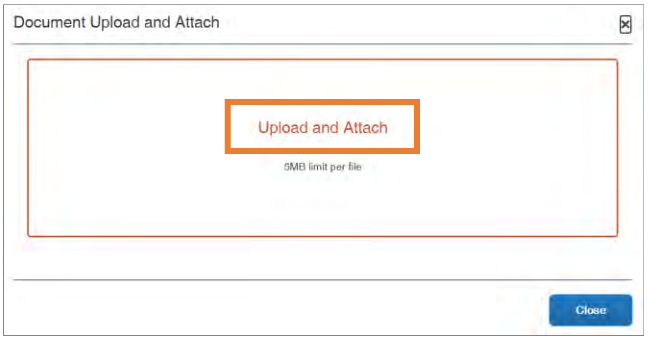
Some travel will require documentation to be submitted along with a travel request. Follow these steps to add an attachment to a travel request:

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.



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.

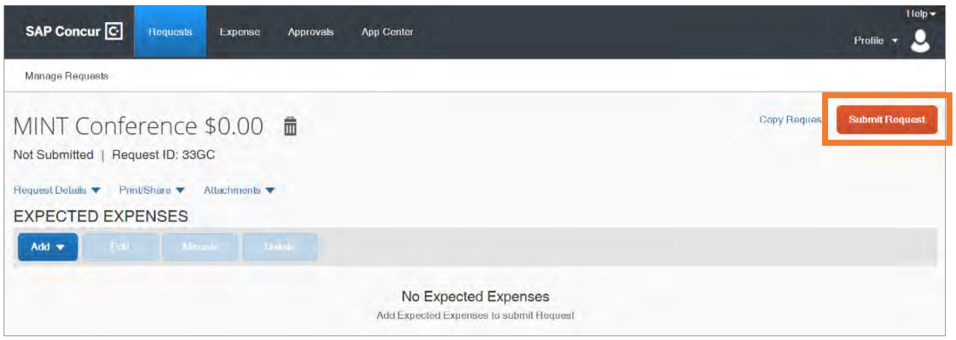
   Note: Once a document is attached, click on the **Attachments** drop-down link to view, delete, or attachment more documents. If attaching multiple documents, the files will be merged into one and cannot be separated.

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.

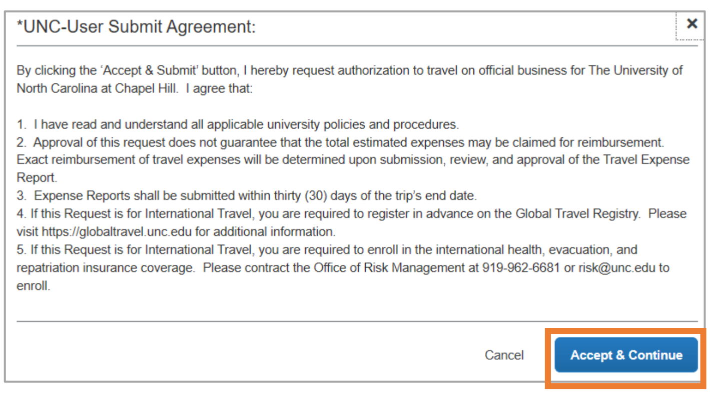
Submitting a Travel Request:

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.

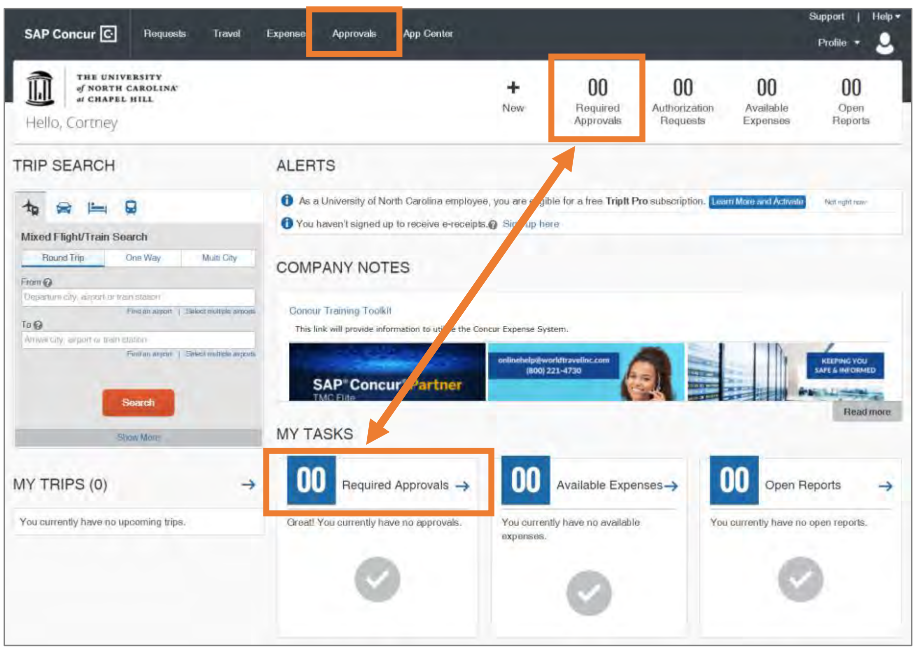
Approving a Travel Request

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

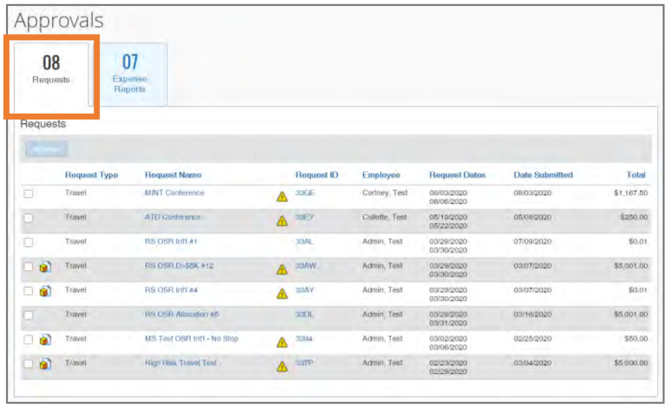
Follow these steps to approve a travel request:

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.

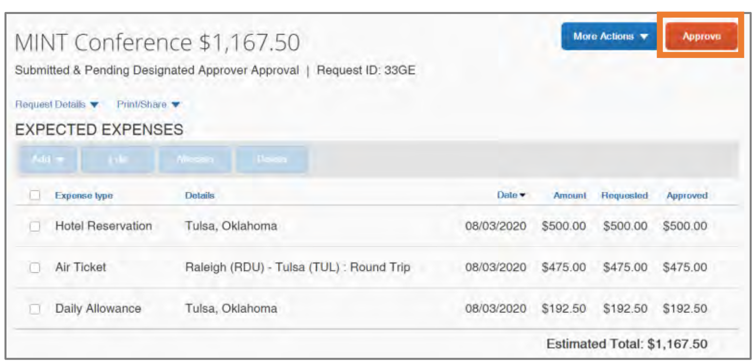


Result: You will see a listing of the travel requests that are pending approval.

3. Click on the **Request Name** link to review the details of the travel request.
4. 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.

5. Click the **Approve** button.



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

6. 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

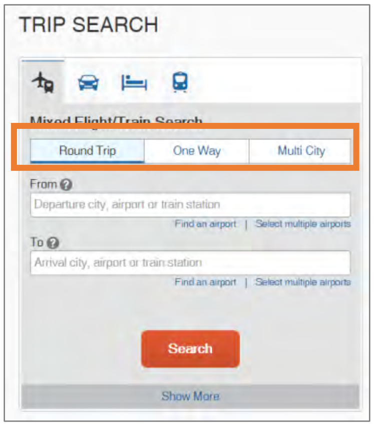
Booking a Trip on Concur Travel is similar to how you would book a personal trip online. Users of the system can book travel themselves as the Traveler or utilize a designated Travel Assistant/Arranger to make the booking and travel reservations.

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:

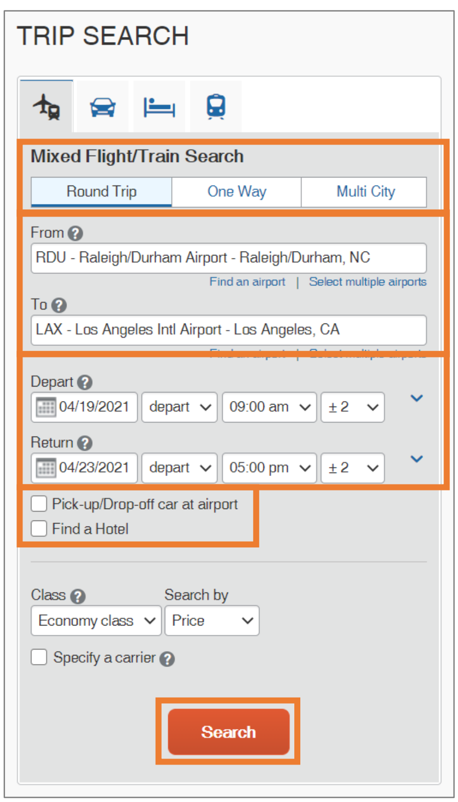
1. From the Concur Homepage, click the **Travel** tab.

   Result: by default, the Flight/Train tab option will be selected.
2. Select one of the following:
   - **Round Trip**
   - **One Way**
   - **Multi City**



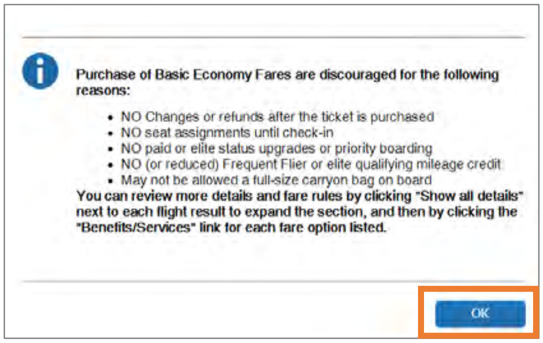
3. In the **From** and **To** fields, enter the cities for travel.

   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.

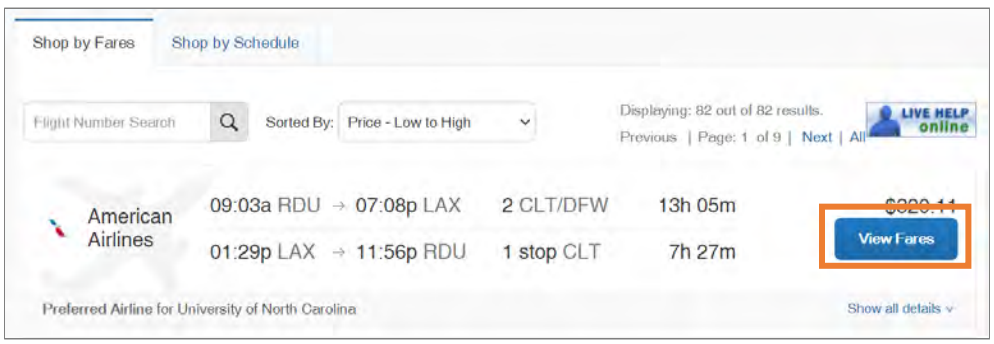


Result: A pop-up window to review Basic Economy Fares information will appear and a listing of reservations options.

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

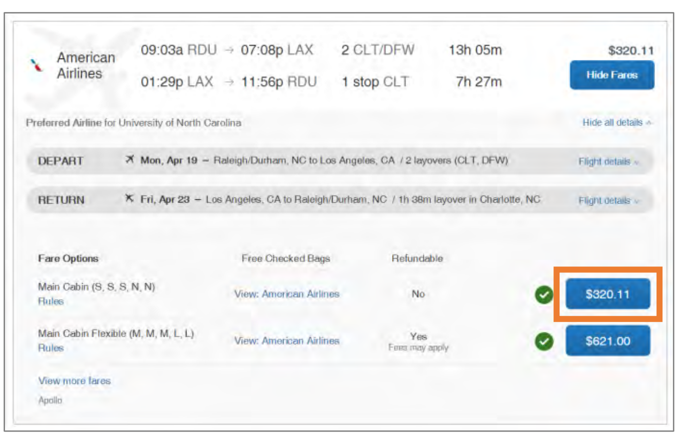


9. Click the **View Fares** button next to the preferred itinerary to view available booking options



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.

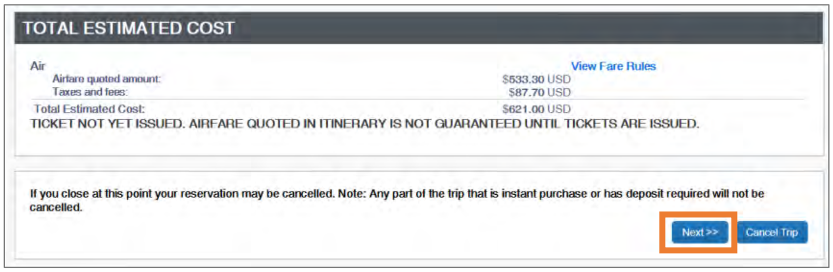
12. Select a **Payment Method**.
13. Click the **Reserve flight and Continue** button.

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.

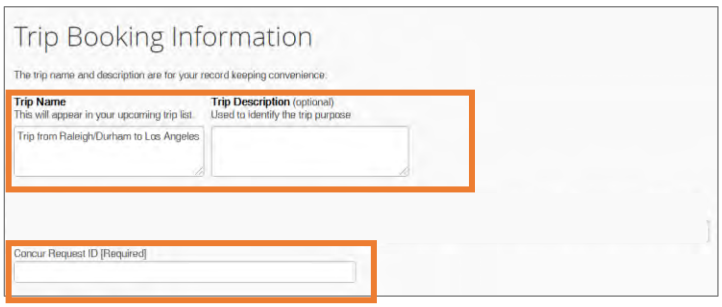
    Adding a Hotel: If you marked the box Find a Hotel from step 5, hotel search results will appear. Review the section, *Booking a Hotel*, for instructions on how to add hotel lodging.

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.



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.



18. Click the **Next** button.

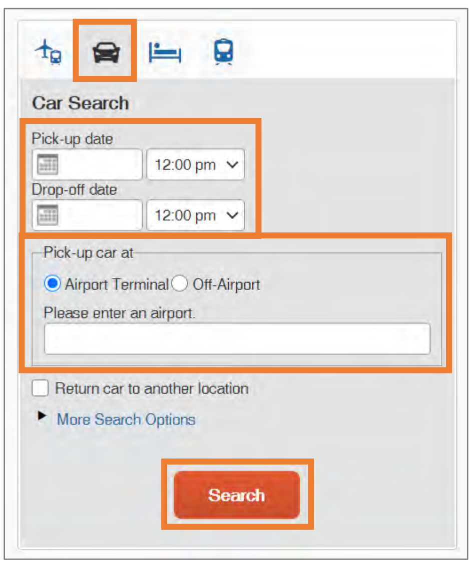
Result: The Trip Confirmation page will appear.

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

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

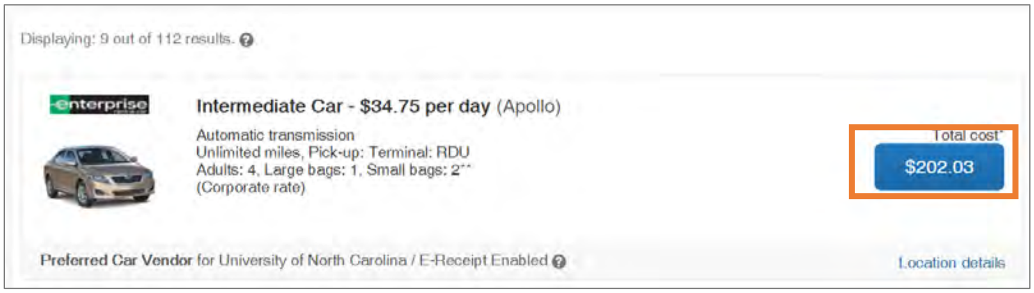
Booking a Rental Car

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.



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.

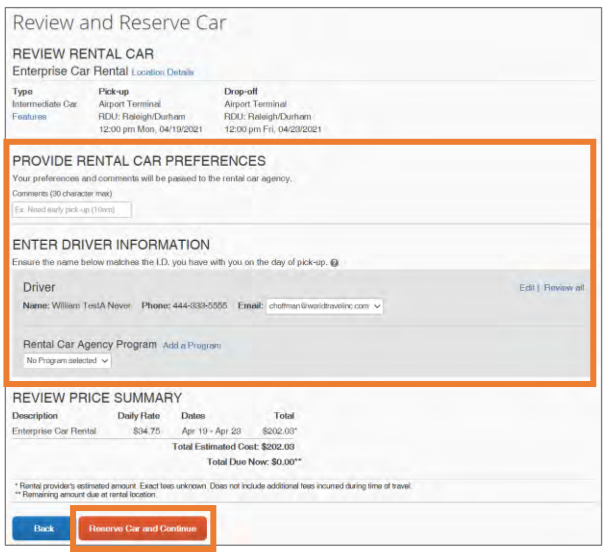


Result: The Review and Reserve Car page will appear.

7. 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.

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

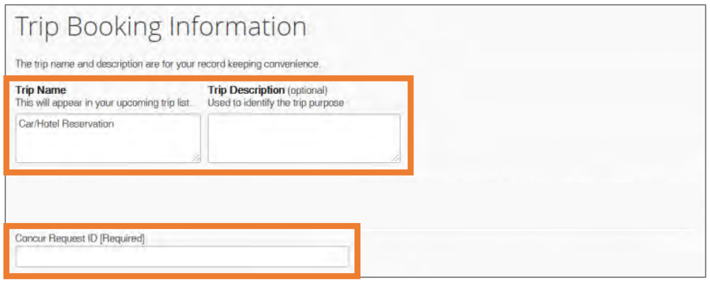


Result: The Travel Details Page will appear.

9. Click the **Next** button.

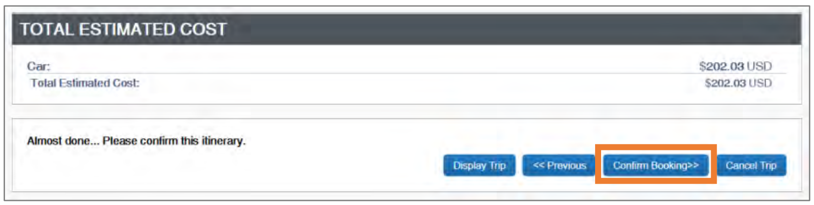
   Result: The Trip Booking Information page will appear.

10. Enter a **Trip Name**, **Trip Description**, and the **Concur Request ID** number associated with the travel.
11. Click the **Next** button.



Result: The Trip Confirmation page will appear.

12. Review the trip details.
13. Click the **Confirm Booking** button.



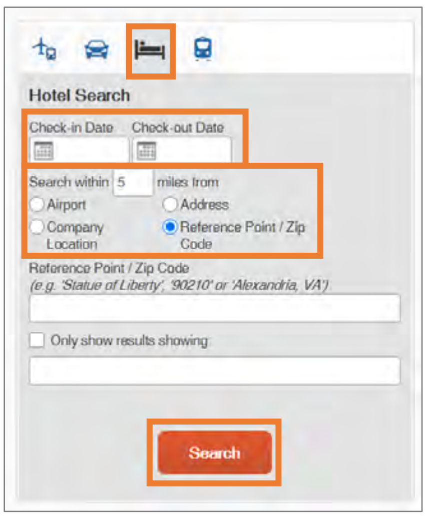
Result: The Finished page will appear stating that you have successfully booked your trip.

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.

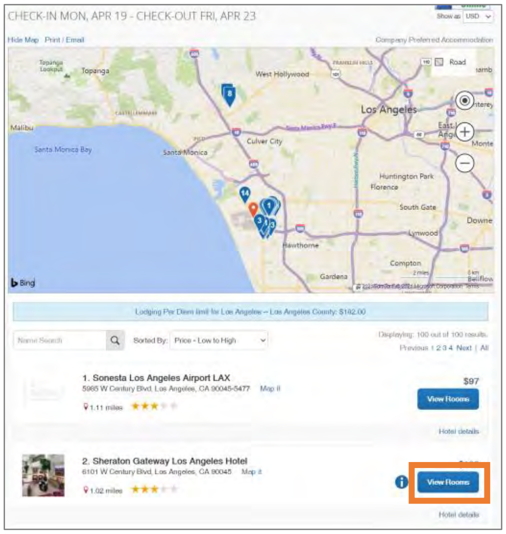
   Note: You can choose to search near an airport, an address, or near another location.
4. Click the **Search** button.



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.

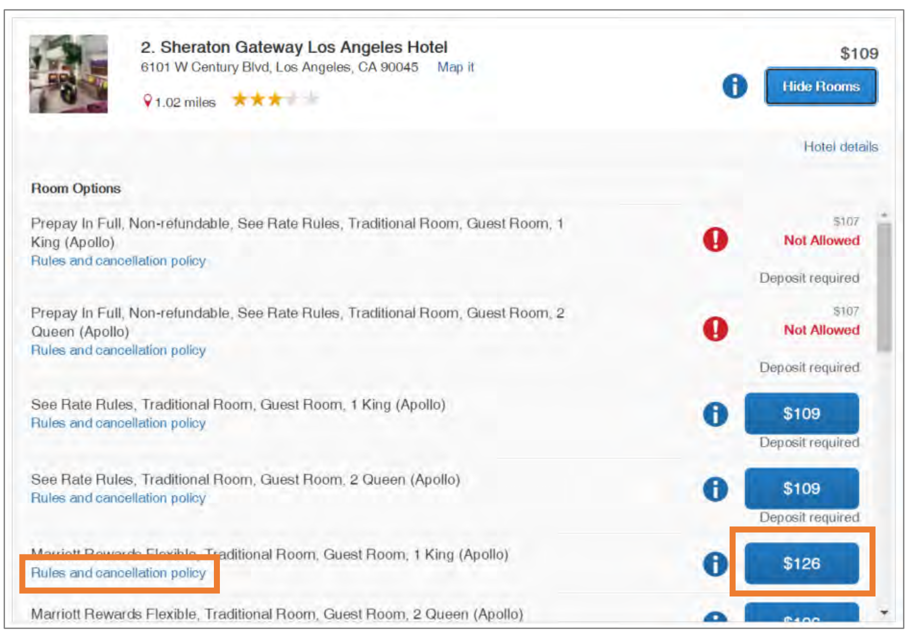


Result: The Review and Reserve Hotel page appears.

8. Review the hotel rate rules and cancelation 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.

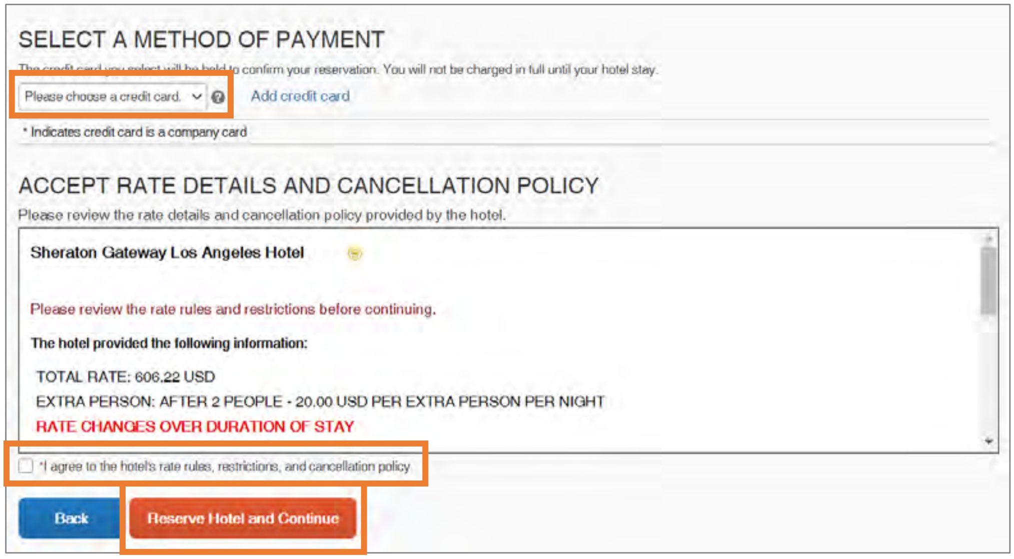


Result: The Review and Reserve Hotel page appears.

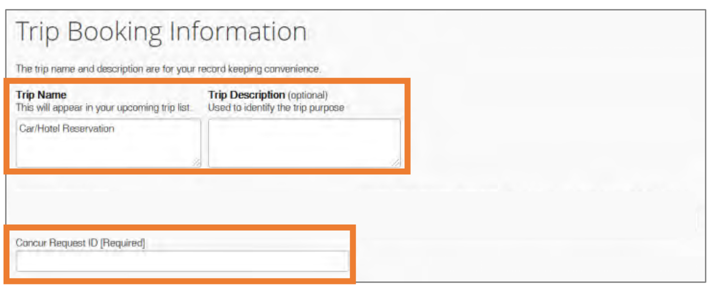
10. Provide any hotel room preferences, if applicable.
11. Select the **Method of Payment.**
12. Mark the check box to accept the rate details and cancellation policy.

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

    Result: The Travel Details page appears.



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



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.

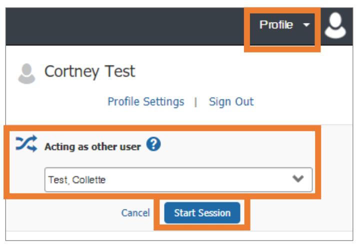
    Result: The Finished page will appear stating that you have successfully booked your trip.

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.

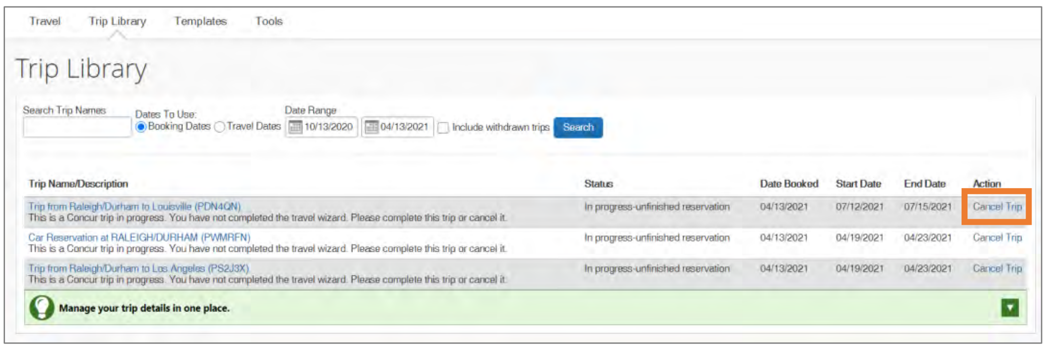
Changing or Canceling a Trip

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.

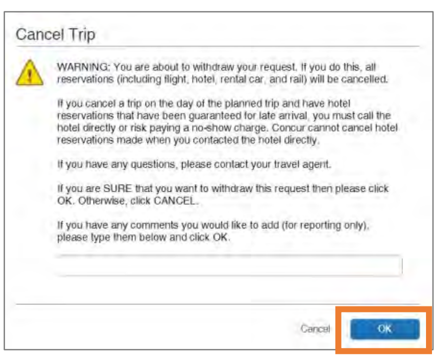
To cancel an entire trip, follow these steps:

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.

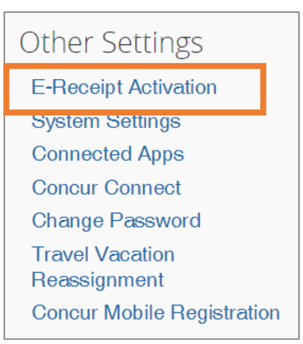
   Note: If you are unable to change or cancel your Concur World Travel reservation, contact your World Travel, Inc agent for assistance.

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).

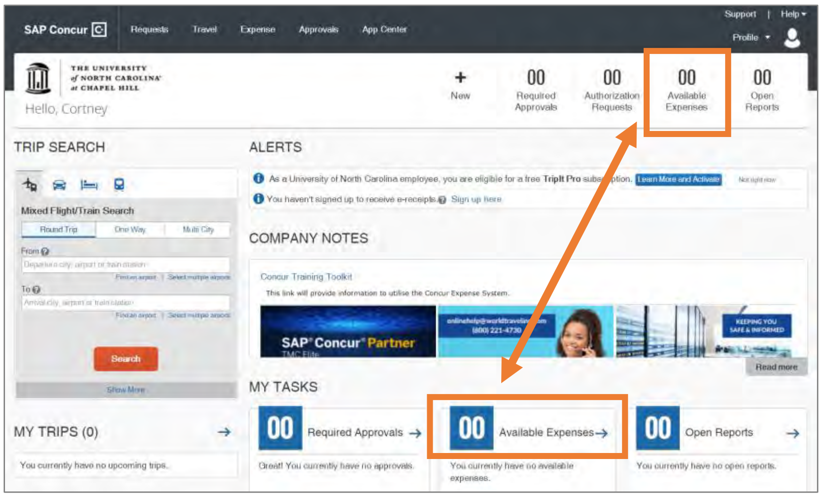
Uploading Receipts to Available Receipts

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.

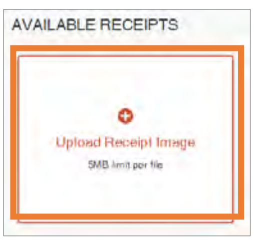
Users may also upload receipts using the Concur Mobile App. These receipts are uploaded to the Concur system automatically and can be viewed in Available Receipts. Then users can attach the receipt images at the line item expense entry level (only).

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

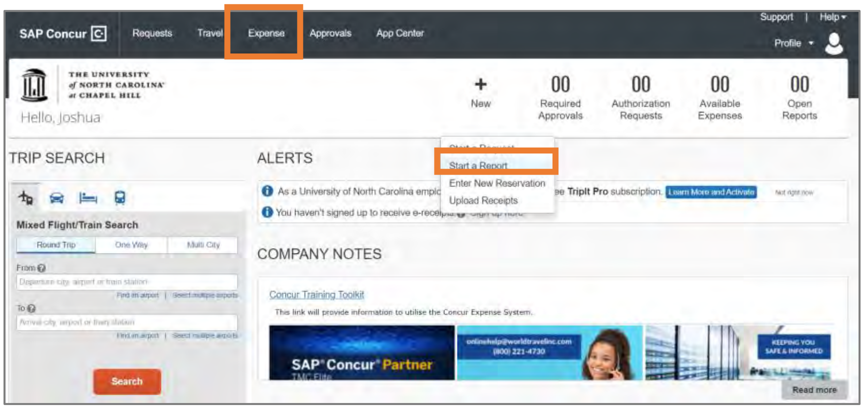
Creating a New Expense Report without a Travel Request

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.

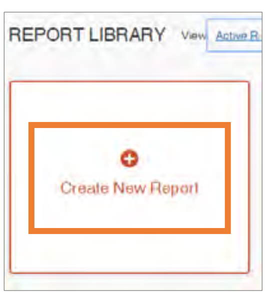
   or

   Click the **Expense** tab.



   Result: The Manage Expenses page will appear.

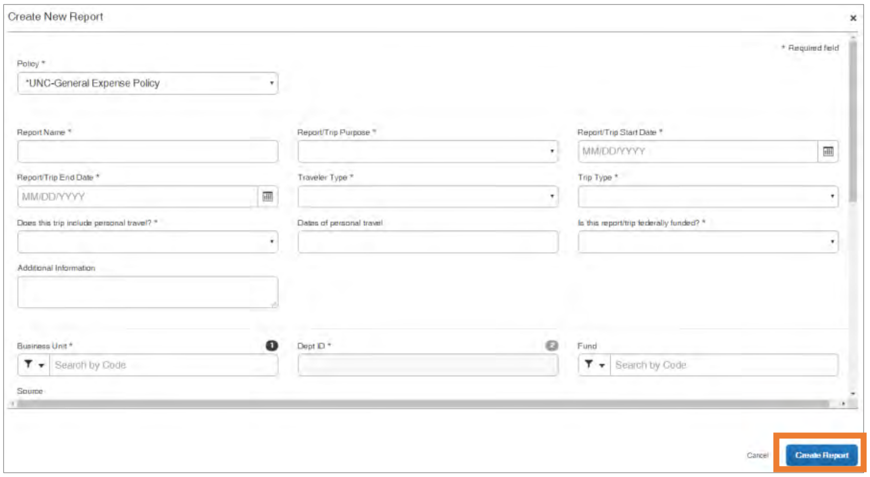
2. Click the **Create New Report** tile in the Report Library section.



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).

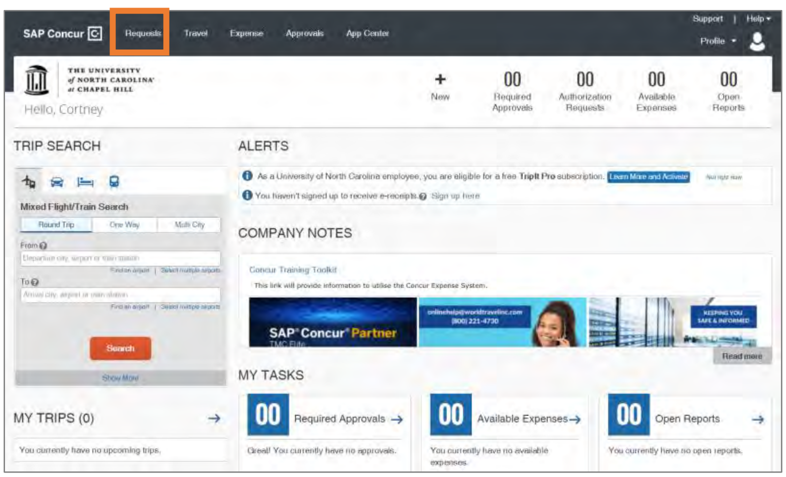
4. Click the **Create Report** button.



Creating a New Expense Report from a Travel Request

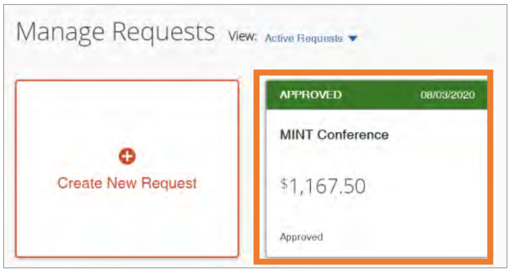
You can create an expense report from an approved travel request. Follow these steps to create a new expense report from a travel request:

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

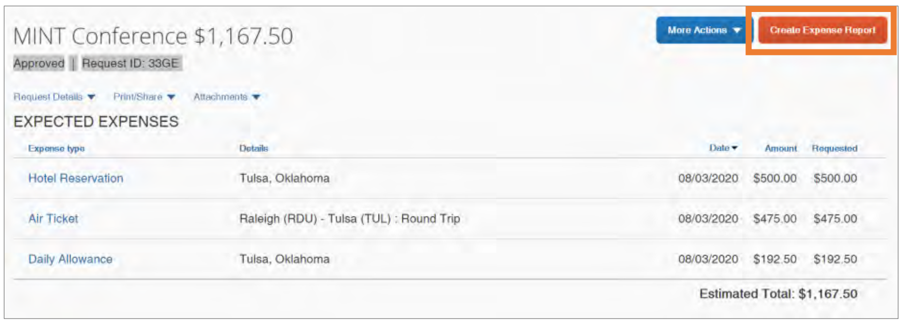


Result: The Active Requests page will appear.

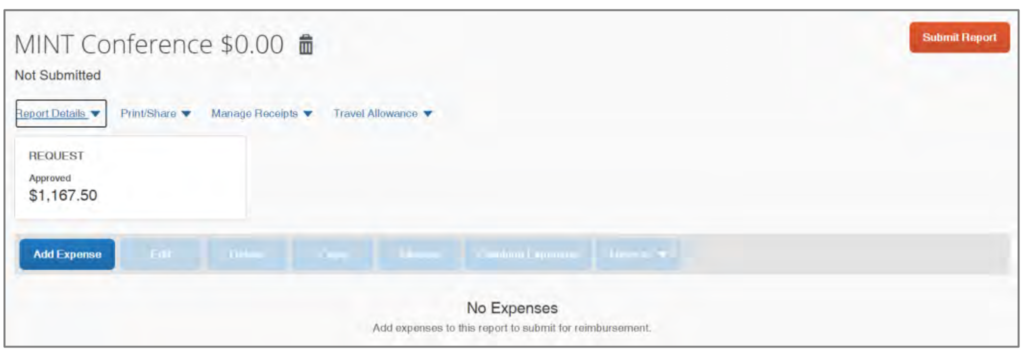
2. Select the Travel Request you want to create an expense report for.



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



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



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.

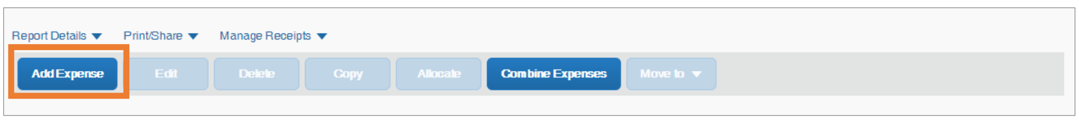
Note: The payment type for T&E Card transactions and Airfare Direct Bill transactions will automatically be assigned and cannot be changed.

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.

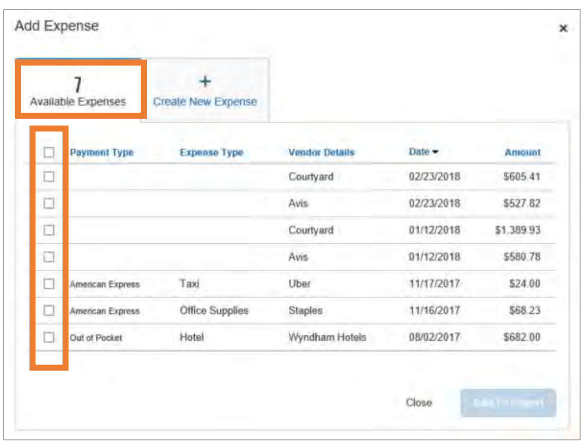
From an open expense report

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.

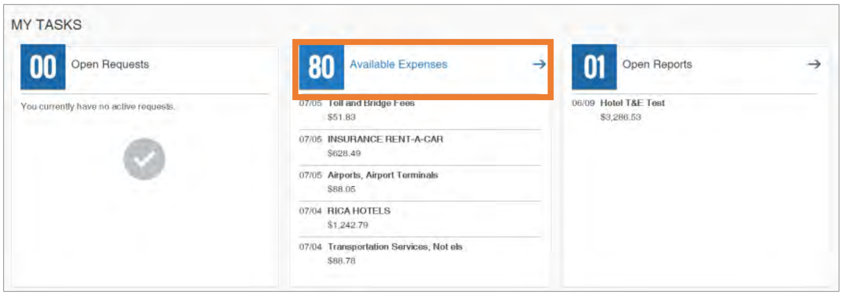


3. Click the **Add to Report** button.

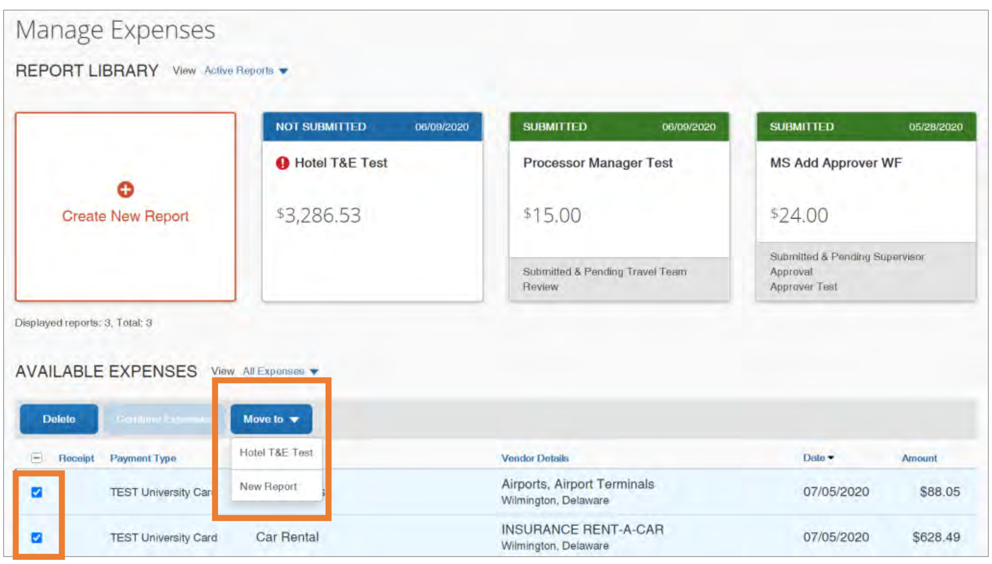
From the Available Expense section

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.



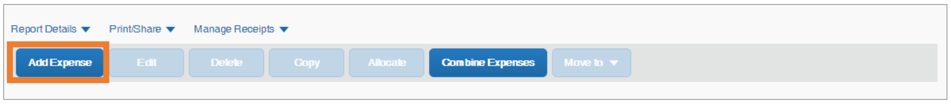
Result: Depending on the action you select; one of two results will occur:

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.

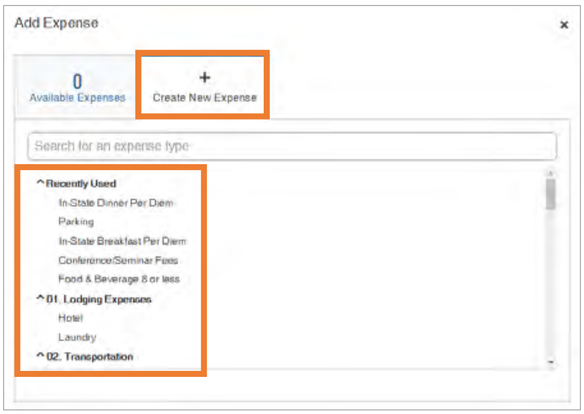
Adding Out-of-Pocket Expenses

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

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

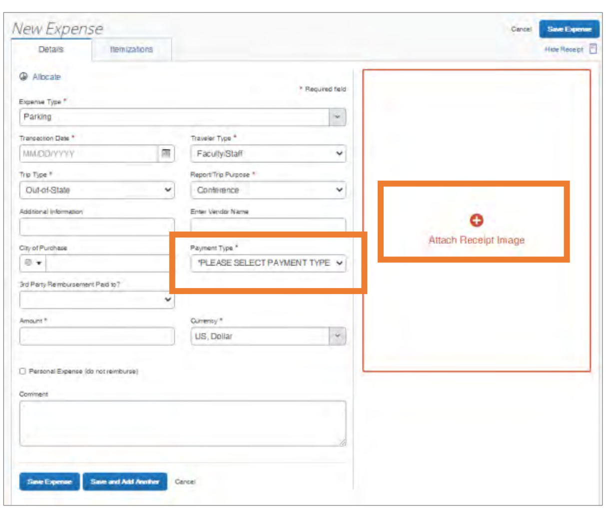


2. Click the **Create New Expense** tab.
3. Search for or select the appropriate expense type from the list.



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.



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:

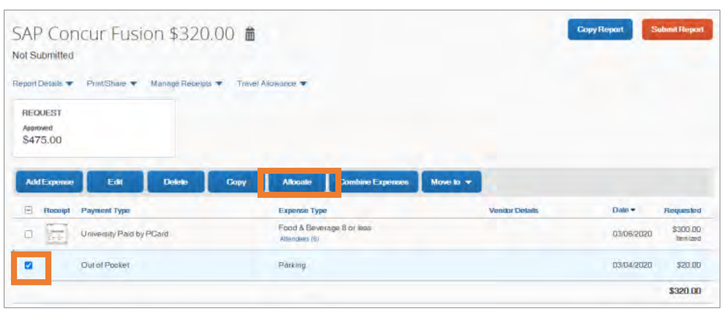
1. Complete one of the following set of steps to get started:

   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.

   Result: The Allocate pop-up window will appear.

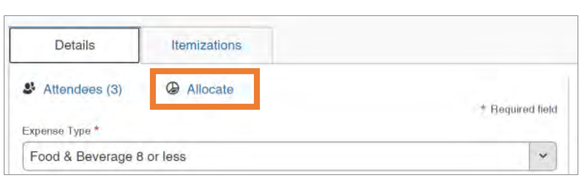
   Allocating a New Expense

   a. Open a current Expense Report.

   b. Click the **Add Expense** button.

   c. Complete the required and necessary fields.

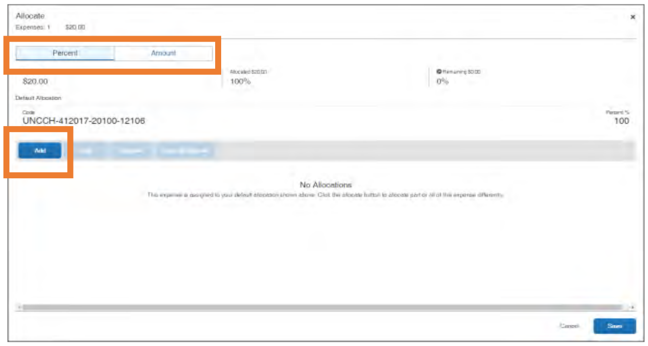
   d. Click the **Allocate** link.

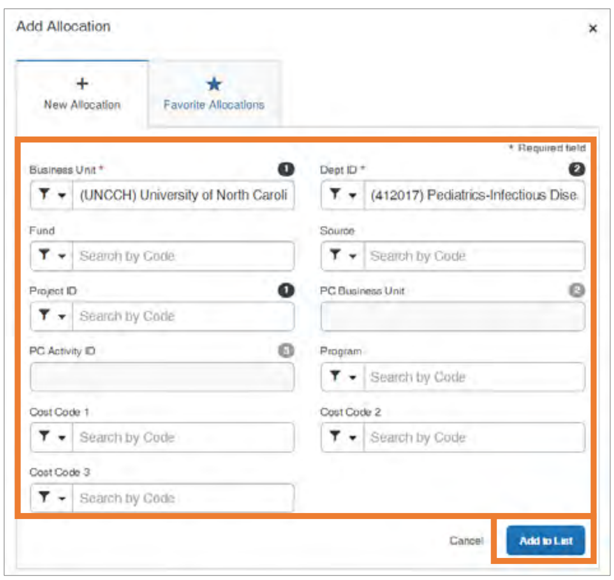
   Result: The Allocate pop-up window will appear.

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

3. Click the **Add** button.

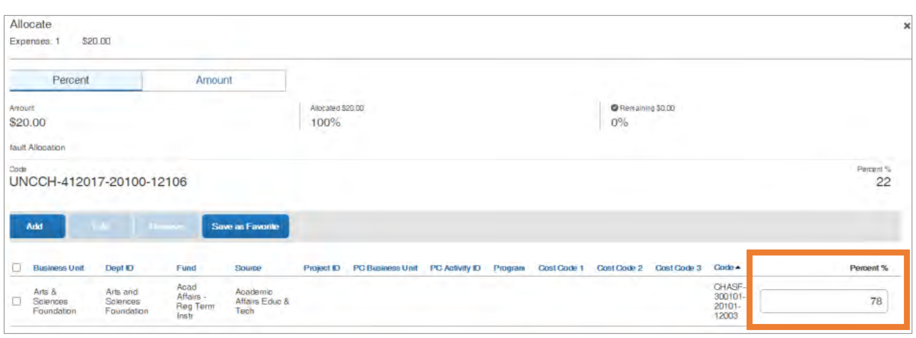


4. Enter the appropriate chartfield string information or select an allocation from your Favorite Allocations Tab.
5. Click **Add to List** button



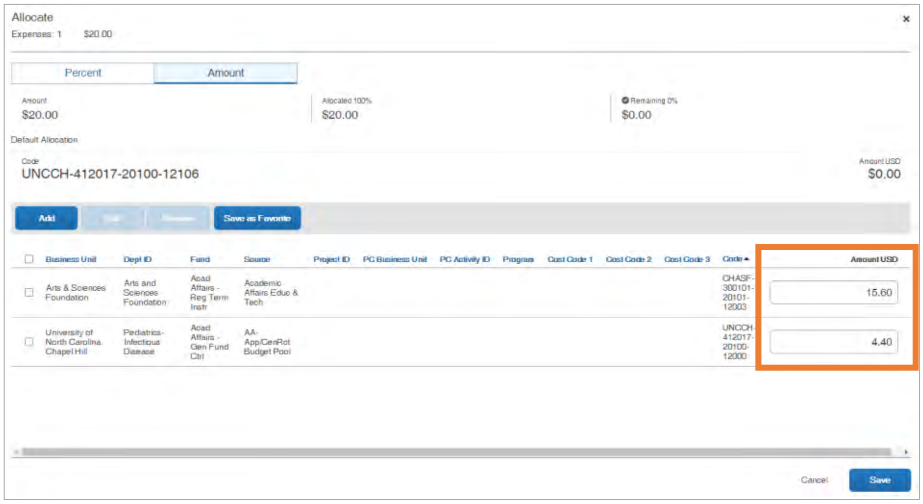
6. Modify the percent or amount for the allocation by percent or by amount.

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



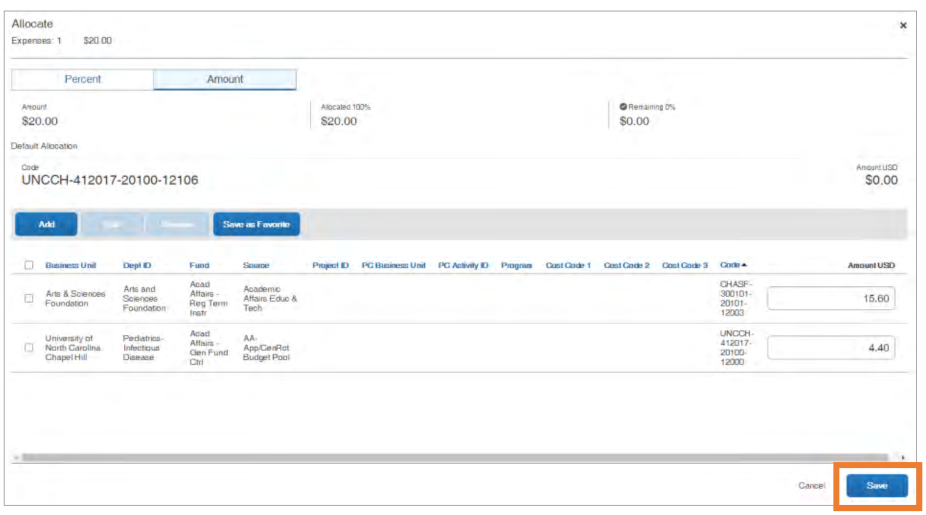
   Note: The total percentage of the lines must equal 100 percent.

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



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

7. 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.
8. Click the **Save** button.



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.

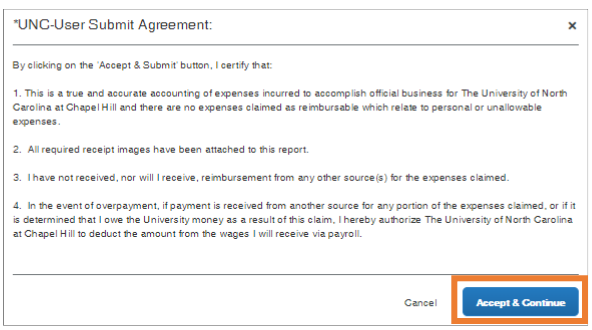
Submitting an Expense Report

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.

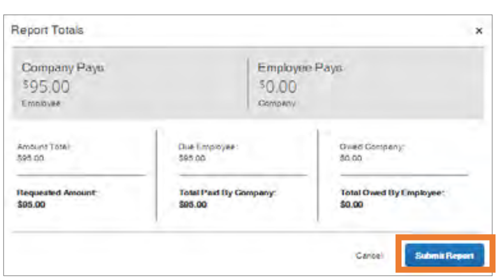
Result: A UNC-User Submit Agreement pop-up window will appear.

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



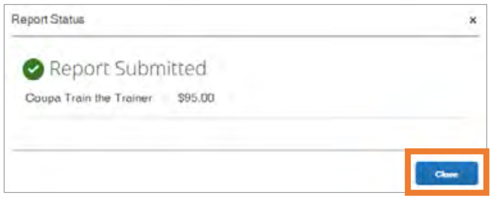
Result: A Report Totals pop-up window will appear. This displays the total amounts, the amount the University (company) will pay, and/or how much the employee owes the University.

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



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

5. Click the **Close** button.

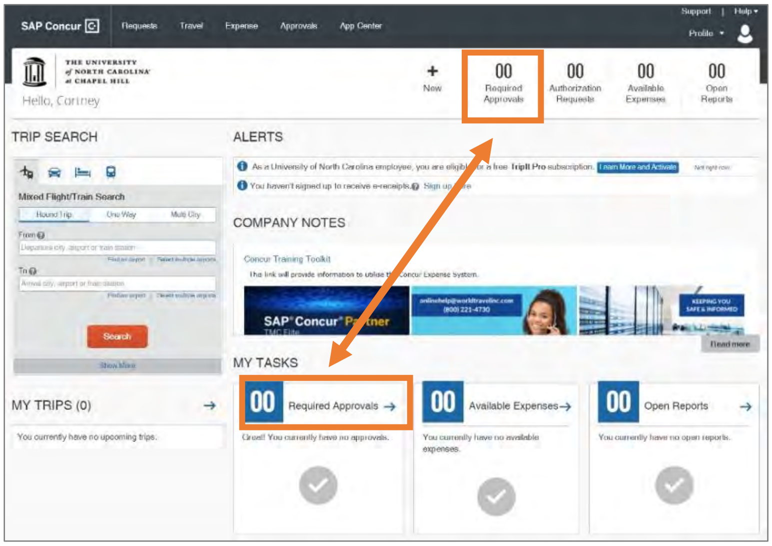


Result: The report is submitted, and the status is listed in the Active Reports list.

Approving Expense Reports

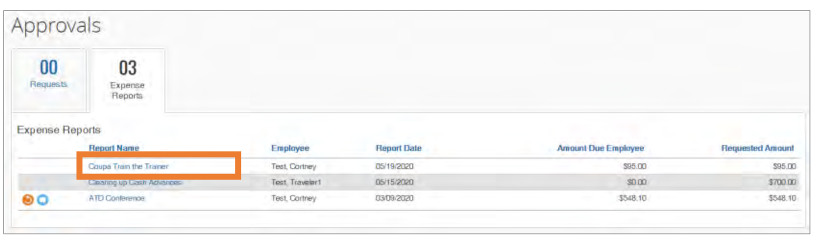
Follow these steps to approve an expense report:

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



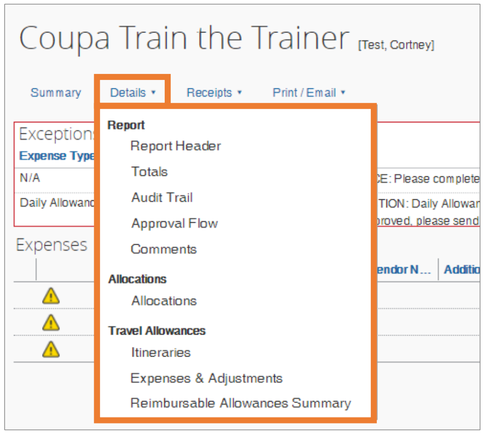
Result: The Approvals page will appear.

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

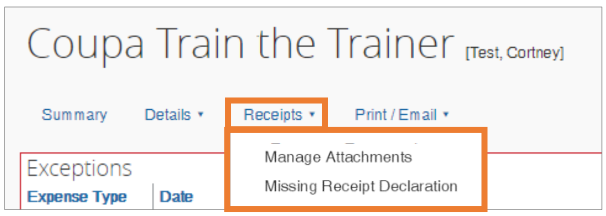


Result: The Summary expense report will appear.

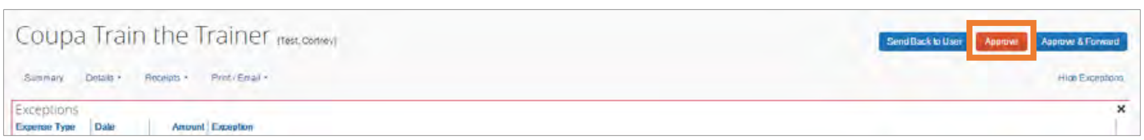
3. Click on the following to review the expense:
   a. **Details** – This link dropdown option will display various elements of the expenses included in the report.



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:

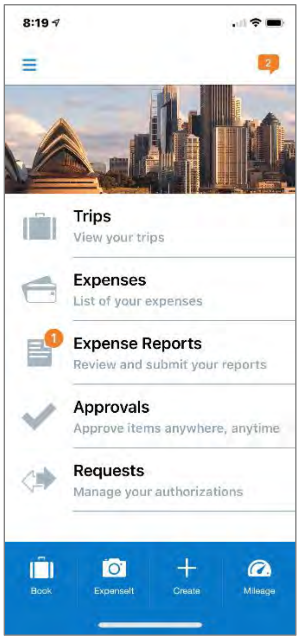
1. Download the app to your device.
2. Open the Concur Mobile App.
3. Enter your ONYEN@unc.edu as the username.
   Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.
4. Tap the NEXT button.

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.

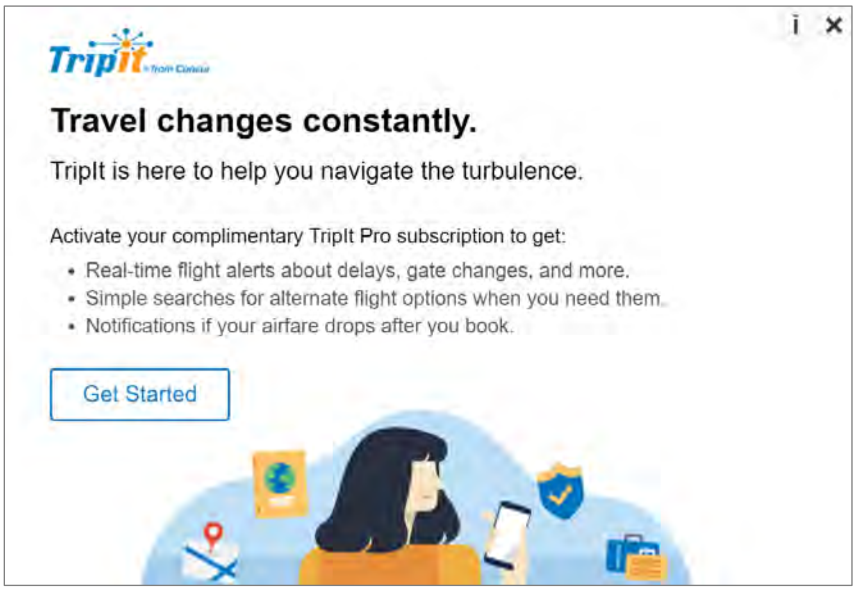
   Result: You will see the Home screen of the app. From here you can perform many actions that you would normally complete using a computer.



Using TripLink

TripLink utilizes My Travel Network, and TripIt 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.
- **TripIt Pro** - This app helps you organize your travel plans and receive real-time alerts and helpful reminders throughout your trip. To activate your TripIt Pro Subscription you must create a TripIt Account using your UNC-CH email address before using the app.



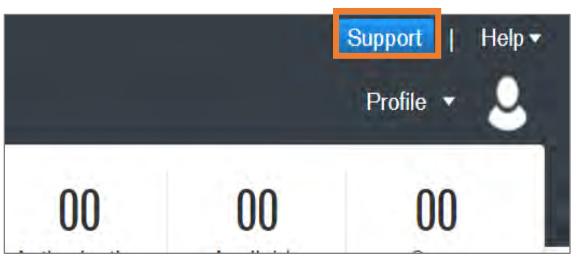
To learn more about TripLink, enroll, and/or activate My Travel Network or TripIt Pro click the App Center on the banner in the Concur system or visit [Concur's Travel Made Easy webpage](#).

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.