

# Concur Support Virtual Office Hours

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Presented by:

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# Office Hours Monthly Rotation Schedule

Week 1 – Travel Requests

Week 2 – Expense Reports – Part I

Week 3 – Expense Reports – Part II

Week 4 – Navigation and Follow Up

# Week 2: Expense Reports – Part 1

## FREQUENTLY ASKED QUESTIONS

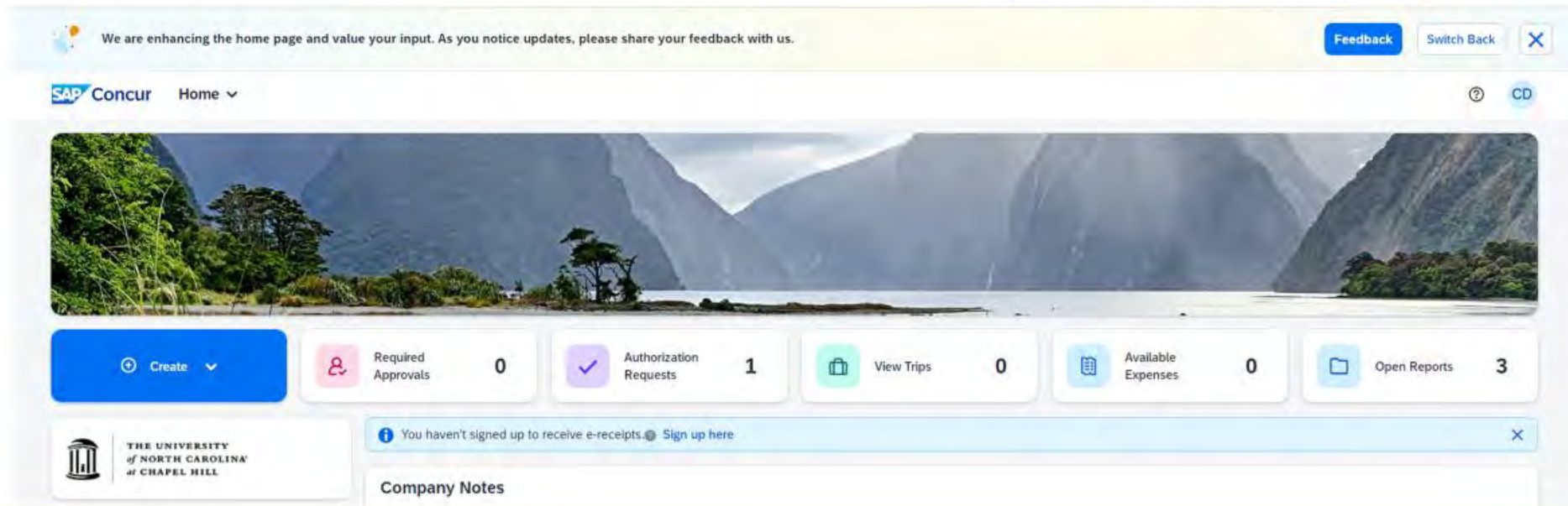
1. How are delegates set up?
2. What are the delegate permissions?
3. How and when do I assign a delegate Approver?
4. How do I set up a default Approver?
5. How do I access the delegated accounts?
6. How do I create an expense report?
7. How do I add expenses? Electronic vs. Out of Pocket
8. Why does it say Please Select Payment Type?

## TIPS

- Pay out of pocket for your individual meals, then claim travel allowance in expense report.
- For business meals in NC, remind the server that the T&E card is tax exempt.
- Create Expense Report from the Travel Request to automatically link them and transfer trip data and payment information.
- Pre-trip and Post-trip expense reports
- Do the travel allowance first, before adding expenses.

# New Concur Home Screen

- Starting Wednesday, Oct. 23<sup>rd</sup>, select Concur users' home screen will update to the new format pictured below
- You will have the option to switch between the new and legacy home screen until end of January

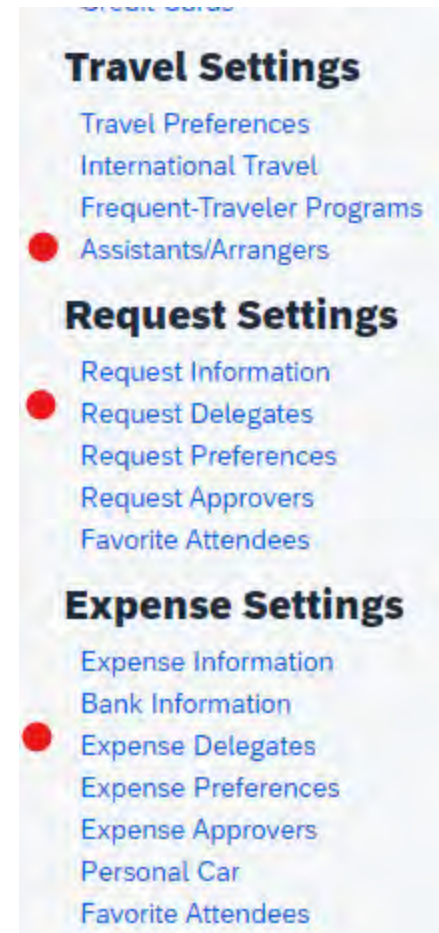
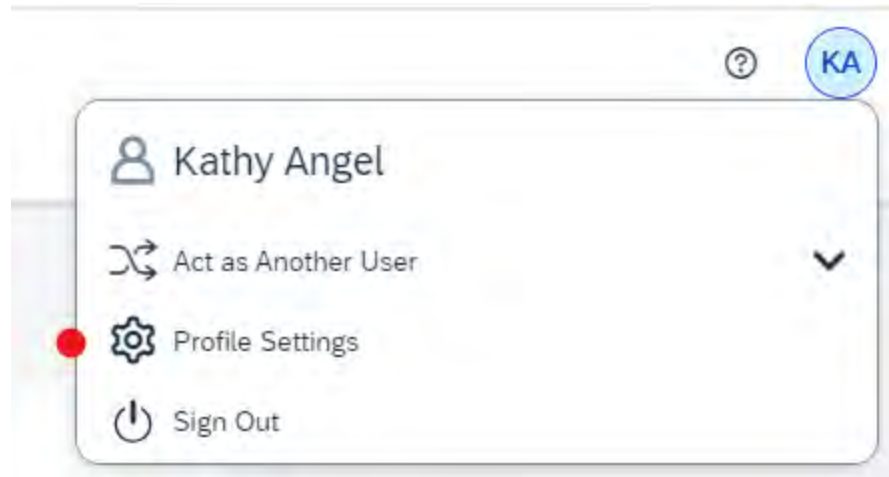


# New Concur Home Screen

The screenshot displays the Concur Home Screen with four main sections:

- Available Expenses:** Shows "No Available Expenses" with a message: "When you have available expenses, you'll see them here".
- Reports (3):** Includes a "+ See All" link and a list of reports:
  - Test Report:** October 11, 2024
  - New York Conference 2024:** September 3, 2024, Amount: \$4,247.85
  - Georgia Conference 2024:** August 19, 2024, Amount: \$2,252.00
- Approvals:** Shows "No Approvals" with a message: "When you have approvals, you'll see them here".
- Requests (1):** Includes a "+" link and a list of requests:
  - San Diego Conference Dec 2024:** December 9, 2024, Amount: \$808.00, Request C.JFX

1. **How are delegates set up?** The user must grant permission in their profile. There are two separate types, one for Travel Arrangers and the other for Expense Delegates. See *Concur Step by Step Guide* pg 27.



**2. What are the delegate permissions?** For travel the option is either Can Book or view only. In Expenses the user may give permission to submit Requests (but not Reports, those must be submitted by the Traveler).

**3. How and when do I assign a delegate Approver?** There are also permission boxes for a delegate to approve on your behalf if you will be out of the office. Note you can grant that for a specific period.

### Expense Delegates

Delegates

Delegate For

Add Save Delete

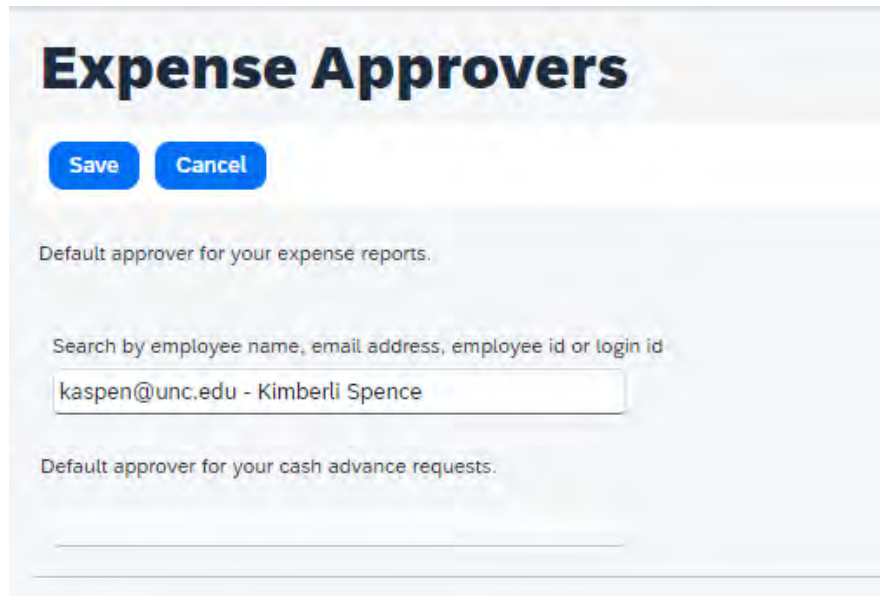
Delegates are employees who are allowed to perform work on behalf of other employees.  
 You may assign a temporary approver for a maximum of 120 days.  
 Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Angel, Robert raangel@email.unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	DeMoss, Christina cdemoss@unc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

- Travel Settings**
  - Travel Preferences
  - International Travel
  - Frequent-Traveler Programs
  - Assistants/Arrangers
- Request Settings**
  - Request Information
  - Request Delegates
  - Request Preferences
  - Request Approvers
  - Favorite Attendees
- Expense Settings**
  - Expense Information
  - Bank Information
  - Expense Delegates
  - Expense Preferences
  - Expense Approvers
  - Personal Car
  - Favorite Attendees

**4. How do I set up a default Approver?** By going into your profile settings, you can add a default approver who will act as a 'Supervisor' Approver. They will view your requests/reports first.

**\*Note:** if you're a Designated Expense Approver or Business Office Approver for your department, you are required to have this completed as you CANNOT approve your own.



**Expense Approvers**

Save Cancel

Default approver for your expense reports.

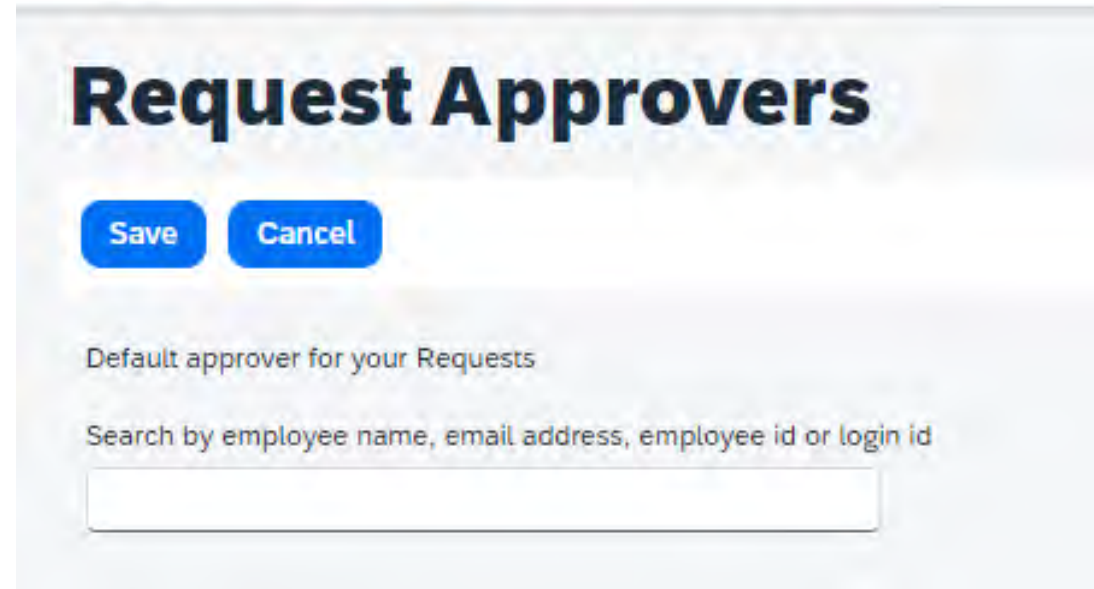
Search by employee name, email address, employee id or login id

kaspen@unc.edu - Kimberli Spence

Default approver for your cash advance requests.

\_\_\_\_\_

\_\_\_\_\_



**Request Approvers**

Save Cancel

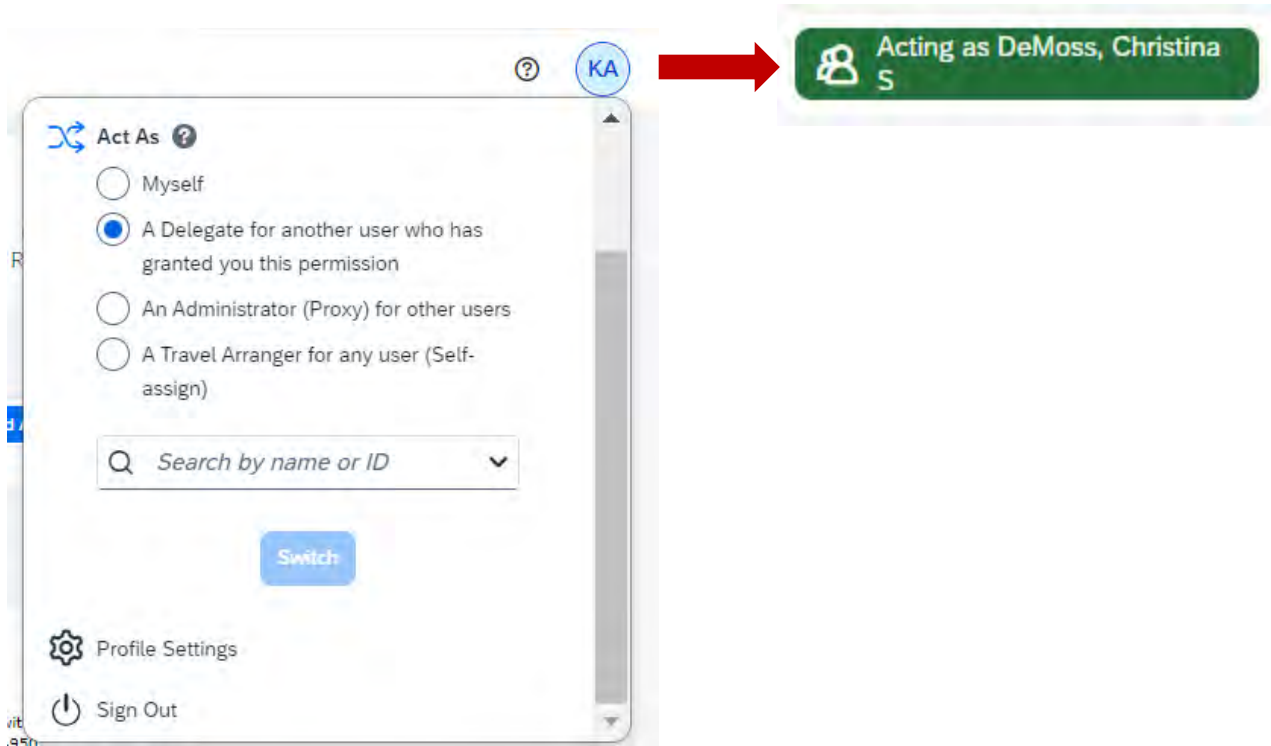
Default approver for your Requests

Search by employee name, email address, employee id or login id

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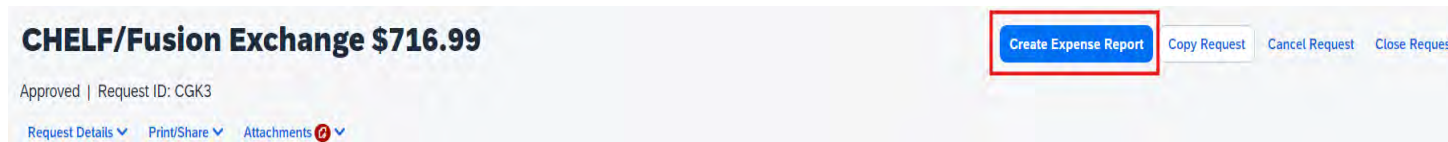


**5. How do I access the delegated accounts?** If you have been granted delegate permissions, you can change to see another person's account and act on their behalf. See *Concur Step by Step Guide* pg 27.

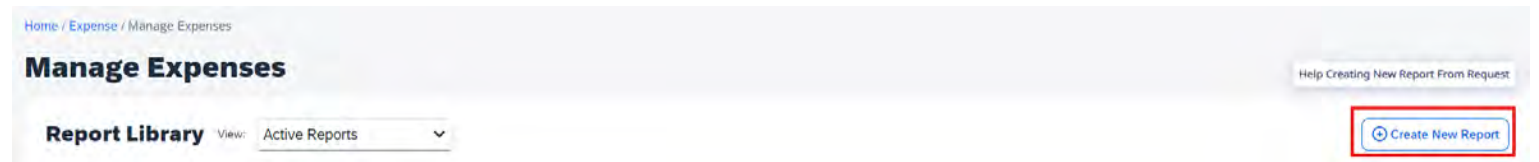


**6. How do I create an expense report?** Open the related travel request. You may need to change the View to All Requests in order to find it. > Once open click Create Expense Report. The reason we do it this way is because it will automatically link the request with the report and bring over all the trip data into the new report header.

- **TIP:** You will typically be creating two reports for each trip, one before you go that has pre-trip expenses such as airfare, conference fees, and sometimes a hotel deposit (paid for w/T&E card or Airfare Direct Bill). The second report would be post-trip when you get back for all expenses incurred while away, including your meals per diem.
- **TIP:** Remember you should always pay for your *individual meals* with a personal card. Only group meals would be paid for with the T&E card.



Creates a new report and opens it.  
You can see it is linked to the Request.



**7. How do I add expenses?** As you can see from the report, even though we created it from the travel request, those anticipated expenses did not automatically populate. That is because the system won't know which items actually apply to your trip. This is a clean slate to enter your *confirmed* expenses.

There are two types of expenses, those charged to a UNC payment card (T&E or Airfare Direct Bill) and those you paid for Out of Pocket. Click Add Expense to see items waiting in your Available Expenses library.

**New York Conference 2024 \$4,134.82** Submit Report Copy Report Delete Report

Not Submitted | Report Number: FKN0GN

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#) 🔔 [View Available Receipts](#)





Expenses View: Standard ▼ Add Expense Edit Delete Copy Allocate Combine Expenses Move ▼

**Add Expense** ×

Available Expenses (1) + Create New Expense

<input checked="" type="checkbox"/>	Payment Type	Expense Source	Expense Type	Vendor Details	Date	Amount	
<input checked="" type="checkbox"/>	University Travel Card	Corporate Card	Ferries/Boats	MILLER BOAT LINE CATAWBA PORT CLINTON, Ohio	07/29/2024	\$136.00	⋮

Close Add To Report

Receipt↓↑	Payment Type↓↑ ⓘ	Expense Type↓↑
	Airfare Direct Bill	Airfare Reservation
	Pending Card Transaction	Expenselt
	University Travel Card	International Transaction Fee (T&E Card Only)
	Out of Pocket	Ground Transportation
	*PLEASE SELECT PAYMENT TYPE	Airfare

### Filter into Concur electronically:

- **Airfare Direct Bill** means it was purchased by calling World Travel and they charged it to the general card that is on file for the University.
- **Pending Card Transaction** is the initial stage of T&E card charges trying to filter into Concur. Wait 3-5 business days for it to fully merge. The text will change automatically to **University Travel Card**. Wait for this to happen before you add the expense to a report.

### Added manually:

- **Out of Pocket** is what you paid for using personal card or cash. It will be reimbursed to your bank account on file with payroll, or via check to your address on Connect Carolina.
- **PLEASE SELECT PAYMENT TYPE** is a receipt. Either change the payment type to 'Out of Pocket' or Combine it with its corresponding card charge.

Payment Type \*

\*PLEASE SELECT PAYMENT TYPE

- Out of Pocket
- Paid by 3rd Party
- University Paid by PCard
- University Paid by PO

View: All Expenses Upload Receipt View Edit Delete Combine Expenses Move

Receipt	Payment Type	Expense Source	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Pending Card Transaction	Expenselt	Hotel	Courtyard by Marriott @ Washington, District of Columbia	10/17/2024	\$71.39
<input type="checkbox"/>	University Travel Card	Corporate Card, E-Receipt, Expenselt	Ground Transportation	Lyft Arlington	10/16/2024	\$44.30
<input type="checkbox"/>	Pending Card Transaction	Reservation	Airfare	American Airlines Hartsfield Intl	10/02/2024	\$199.47
<input checked="" type="checkbox"/>	Out of Pocket	E-Receipt	Airfare	Southwest	10/02/2024	\$199.47
<input type="checkbox"/>	University Travel Card	Corporate Card, Reservation, E-Receipt	Airfare	Southwest Hartsfield Intl	10/02/2024	\$132.79
<input checked="" type="checkbox"/>	University Travel Card	Corporate Card	Airfare	AMERICAN AIR0017056876733 Fort Worth, Texas	10/02/2024	\$199.47

To find missing transactions: [Card Transactions](#)

**TIP:** If you need to make changes after you submit the report, you can always Recall it for further edits.

**SCTEM Conference 2024 \$1,363.14** Recall Report Copy Report

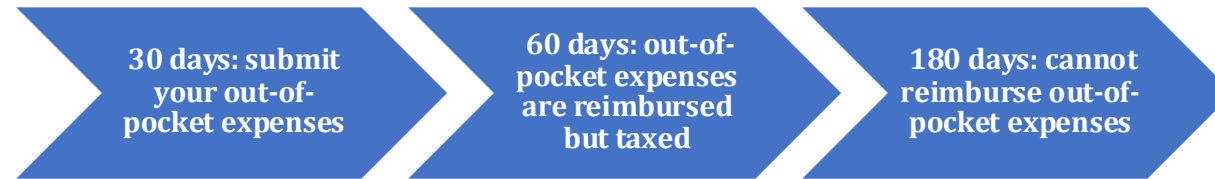
Submitted & Pending Travel Team Review | Report Number: NPUWWJ

REQUEST	
Approved \$2,803.10	Remaining \$1,337.11

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

# News & Alerts: Changes in the past six months

- [Taxation/Accountability Plan](#): Effective 4/25/24 any expense report approved by the Travel Team that has submitted out-of-pocket expenses more than 60 days old will be sent to payroll for taxation. Out-of-pocket expenses cannot be submitted for reimbursement after 180 days.
  - These started coming out in the May payroll. To request a review and dispute please email the Controller's office at [controller@unc.edu](mailto:controller@unc.edu)



- [Mileage Policy](#) : Over 350 miles – IRS reimbursement rates \$0.67 & \$0.335. For over 750 miles flight cost comparison required or business justification for necessity to drive.
- [Conference Agenda](#): The Travel Team recommends you attach copy of the conference agenda to the travel request and again on the expense report for approver reference.
- [Daily Allowance](#): Best practice is to claim daily allowance in your post-trip report that will contain your hotel/non hotel lodging expenses.

# Concur Monthly In-Depth Webinar

This webinar is geared towards Business Officers, Accounting Technicians, Executive and Administrative Support and anyone approving Travel Requests or Expense Reports.

Please register in Carolina Talent.

To find dates please visit our webpage.



# Please submit your service requests to: <https://go.unc.edu/concursupport>

Please send your emails regarding status of Expense Reports, Flight cost comparisons, policy related questions to: [travel\\_team@unc.edu](mailto:travel_team@unc.edu)

Please contact WorldTravel at (877) 602-4950 or  
[uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)

for assistance with booking air, car rental or hotel

For more information on policies/guidelines, please visit:  
[finance.unc.edu/services/travel](https://finance.unc.edu/services/travel)



# CONCUR TRAVEL - HELPFUL LINKS

Hold Control button and click link to open.

LINK	TRAVEL POLICY & PROCEDURES
<a href="#">T&amp;E</a>	Travel guide, checklist, and FAQs
<a href="#">FORM</a>	Forms library
<a href="#">INTL</a>	International travel
<a href="#">GRP</a>	Group & Guest travel
<a href="#">POL</a>	Policies & Procedures
<a href="#">TAM</a>	Travel Allowance & Mileage

LINK	CONCUR TRAINING
<a href="#">CONC</a>	Concur instruction pdfs & training videos
<a href="#">HELP</a>	Submit Help Ticket for 1:1 assistance
<a href="#">OFC</a>	Office Hours for weekly drop-in Q&A
<a href="#">WEB</a>	Webinar registration for deep-dive training

## CONTACTS

World Travel (877) 602-4950  
[uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)

[travel\\_team@unc.edu](mailto:travel_team@unc.edu)

[controller@unc.edu](mailto:controller@unc.edu)

[Travel Card and Payment Services](#) website.

\* If a traveler has at least two overnight trips per year, they should request a University Travel Card.

# Daily Allowance - Reminders

- **Reminder:** GSA rates for travel in the Continental US are updated each year effective October 1<sup>st</sup>
  - If travel begins in September and ends in October, you may see different rates for the same location
- Reports with Daily Allowance that have been submitted for approval prior to October 28<sup>th</sup> will not be impacted by this update.
- Travel Requests and Expense Reports created on or after October 28<sup>th</sup> will utilize the new Travel Allowance UI

## **Web Links & Contact Information for Forms, Policies & procedures for UNCCH**

- Concur Home Page – link to support, concur login, quick reference guides, training materials and all things Concur related

<https://finance.unc.edu/services/travel/concur/>

- Concur Support – to assist with navigation and functionality of Concur

<https://go.unc.edu/concursupport>

- For policy related questions, flight cost comparisons status of expense report send email to Travel Team [travel\\_team@unc.edu](mailto:travel_team@unc.edu)
- For assistance with booking air, car rental or hotel and obtain cost comparisons contact WorldTravel at (877) 602-4950 or email [uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)

- Travel Forms & Policies

<https://finance.unc.edu/policies-procedures-and-forms/forms-libr>

- Travel & Expense Card – frequent used forms, policies, application and handbook guide

<https://finance.unc.edu/services/card-services/travel-expense-card/>

- PCard and University Travel Card questions can be emailed to [pcard@unc.edu](mailto:pcard@unc.edu) or [travelcard@unc.edu](mailto:travelcard@unc.edu) as appropriate

- UNC Global Affairs for International Travel information & forms

<https://global.unc.edu/preparing-for-international-travel/>

- UNC Equal Opportunity & Compliance to request a travel medical accommodation

<https://eoc.unc.edu>

- Locate current Federal GSA (Government) Per Diem Rates

<https://www.gsa.gov/travel/plan-book/per-diem-rates>

- Locate International (Foreign) Per Diem Rates

[https://aoprals.state.gov/web920/per\\_diem.asp](https://aoprals.state.gov/web920/per_diem.asp)