

Concur Support Virtual Office Hours

Presented by:

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&

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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 4: Navigation & Follow up

FREQUENTLY ASKED QUESTIONS

1. Where should I look to get estimated costs of airfare and hotel?
2. How do I create/get a cost comparison?
3. How do I itemize a hotel? Restaurant?
4. What do I do with duplicate expenses? Combine or Delete depending
5. How do I see my older requests and reports?
6. Why am I getting email reminders when I already submitted expense report?
7. How can I find if I already submitted an expense? Card Transactions
8. How to find Report Totals/ Payments/Timeline?

TIPS

- Cost comparisons can be obtained on concur, from travel team, or World Travel. If needed in arrears, ask World Travel.
- Check our [website](#) for policy, procedures, forms, and training documents/videos.
- Before a trip, use the [checklist](#) to make sure you are prepared with approvals and correct documents.
- Reminder to submit (1) travel request, (2) pre-trip expense report, and (3) post-trip expense report.
- Put all one-day expenses on one report for a calendar month.

1. How do I get estimated costs of airfare and hotel? You can call World Travel, but it is just as easy to run a trip search in Concur and just not save it. Airfare will require you walk through the options for non-stop or layover, times of day options, and pricing options. You'll need to choose a departure flight before you will see the options for the return flights.

For Hotel estimates run a Concur search for the city and dates. It will display the anticipated per diem rates for Lodging, Meals, and Incidentals which it gets from the government [GSA site](#). For University purposes add another 50% to get the maximum amount allowed for the nightly room rate.

The screenshot displays three panels from the Concur system. The 'Trip Search' panel shows a 'Hotel Search' section with check-in and check-out dates set to 10/07/2024 and 10/11/2024, respectively. The search is set to 5 miles from the airport, with 'Airport' selected as the search criteria. The location entered is 'BOS - Boston Logan Intl Airport - Boston, MA'. The 'Trip Summary' panel shows a 'Select a Hotel' section with 4 nights, located at Boston Logan Intl Airport, Boston, MA, with check-in on Mon, 10/07/2024 and check-out on Fri, 10/11/2024. The 'Finalize Trip' button is visible. The 'Hotel Per Diem Locations' panel shows search filters for Country/Region (United States (US)), State/Province (Massachusetts (MA)), and Location (Boston -- Suffolk County). Below these filters is a table of per diem rates.

| Lodging Rate | Meals Rate | Incidentals Rate |
|--------------|------------|------------------|
| \$ 322 | \$ 74 | \$ 5 |

2. How do I get a cost comparison?

In Concur search for the airfare dates that would be just for the business days.

EX: 10/7 to 10/11 airfare Raleigh to Boston the cost would be \$291.20.

Be sure to capture the date quote is taken. Screenshot should include bottom right of screen. Or print to PDF will automatically include it in top left.

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 BOS - Boston Logan Intl. Airport - Boston, MA Find an airport | Select multiple airports

Depart 10/07/2024 depart 12:00 pm ± 10

Return 10/11/2024 depart 12:00 pm ± 10

Pick-up/Drop-off car at airport

Find a Hotel.

| Flight | Time | Type | Duration | Fare |
|---------|-------------------------|---------|----------|----------|
| JetBlue | 04:35p RDU → 06:44p BOS | Nonstop | 2h 09m | \$291.20 |
| JetBlue | 06:10a BOS → 08:13a RDU | Nonstop | 2h 03m | |

Hide all details

DEPART ✕ Mon, Oct 7 - Raleigh/Durham, NC to Boston, MA Hide details

Mon, Oct 7 04:35p RDU → 06:44p BOS 2h 09m JetBlue 1784 [View seats](#)
223 / 386 lbs CO₂

RETURN ✕ Fri, Oct 11 - Boston, MA to Raleigh/Durham, NC Hide details

Fri, Oct 11 06:10a BOS → 08:13a RDU 2h 03m JetBlue 1883 [View seats](#)
Embraer 190 / 386 lbs CO₂

| Fare Options | Free Checked Bags | Refundable | Price |
|---|-------------------|------------|----------|
| Blue (P, R) Rules View: JetBlue | No | No | \$291.20 |
| Blue Extra (P, R) Rules View: JetBlue | No | No | \$341.21 |
| Blue Ref (P, R) Rules View: JetBlue | No | No | \$423.40 |

Search 8:04 AM 9/5/2024

Then run a second airfare search with the dates that would be for business plus personal dates. It must be the same outgoing flight.

EX: 10/7 to 10/13 airfare Raleigh to Boston the cost would be \$426.20.

The cost difference is \$135.00 more, which will need to be itemized out and marked as Personal in the expense report.

Attach both quotes to the travel request and again on the expense report.

The screenshot displays a flight search interface. On the left, the search criteria are: Origin: RDU - Raleigh/Durham Airport - Raleigh/Durham, NC; Destination: BOS - Boston Logan Intl Airport - Boston, MA; Departure Date: 10/07/2024; Departure Time: 12:00 pm; Return Date: 10/13/2024; Return Time: 12:00 pm; Search by: Schedule. The 'Selected Fare' section shows a round trip on JetBlue for \$426.20. The departure flight is on Monday, Oct 7, from RDU to BOS (04:35p to 06:44p) on JetBlue 1784, lasting 2h 09m. The return flight is on Sunday, Oct 13, from BOS to RDU (08:55p to 11:07p) on JetBlue 783, lasting 2h 12m. The fare includes free checked bags and is refundable. The total cost is \$426.20, with a 'Remove' button and a 'Hide Fares' button.

Note: If you must travel by car because you are transporting equipment or other people, include that information in the header comments. The mileage will still be calculated at the reduced rate, but the airfare comparison is not required.

3. How do I itemize a hotel? Restaurant? Access the Concur Step by Step Guide pg. 134 on our [website](#)

- The room rate and taxes should be separated *per night*

New Itemization * Required field

Expense Type *
Hotel x v

Recurrence * i
Same daily amount v

📅 Nights: 4

| Date | Room Rate* | Room Tax | Tax 2 | Tax 3 |
|------------|----------------------|----------------------|----------------------|----------------------|
| 08/03/2024 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 08/04/2024 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 08/05/2024 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 08/06/2024 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

- When itemizing international hotel expenses, you can combine both room and tax into the Room Rate field box

- An itemized receipt is ALWAYS required for a hotel expense.
- When booking a non-traditional hotel (VRBO, AirBnB, hostel, etc.), you will need to:
 1. fill out a Non-Hotel Lodging Authorization Request Form
 2. Have two hotel cost comparisons
 3. Email the Request Form and two hotel comparisons to Travel Team at travel_team@unc.edu

Vendor
Hotel w/Deposit

Amount *
(325.00)

4. What do I do with duplicate expenses? It depends on the situation.

- If you have the charge that shows paid by **University Travel Card** or **Airfare Direct Bill** and you also have a line for the same date and amount with a receipt, check the two boxes to the far left of both lines and click Combine button.

The screenshot shows a software interface for managing expenses. At the top, there are navigation tabs: Report Details, Print/Share, Manage Receipts, and Travel Allowance. Below these are several action buttons: Add Expense, Edit, Delete, Copy, Allocate, Combine Expenses, and Move to. A 'View: Standard' dropdown is also present. The main table has columns for Alerts, Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, Amount, and Requested. Two rows are visible, both with checked boxes in the Alerts and Comment columns. The first row is for an 'Airfare Direct Bill' from British Airways, dated 05/21/2024, for \$1,382.70. The second row is for a pending transaction with the payment type '*PLEASE SELECT PAYMENT TYPE', also from British Airways, dated 05/21/2024, for \$1,382.70.

| Alerts | Comment | Receipt | Payment Type | Expense Type | Vendor Details | Date | Amount | Requested |
|-------------------------------------|-------------------------------------|---------|-----------------------------|---------------------|--|------------|------------|------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | Airfare Direct Bill | Airfare Reservation | British Airways Charlotte, North Carolina | 05/21/2024 | \$1,382.70 | \$1,382.70 Itemized |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | *PLEASE SELECT PAYMENT TYPE | Airfare | British Airways Amsterdam, NETHERLANDS | 05/21/2024 | \$1,382.70 | \$1,382.70 |

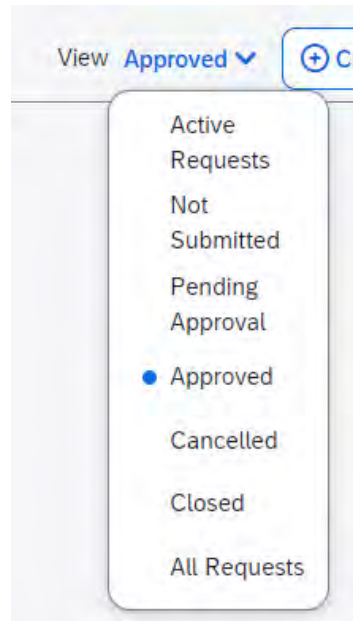
- If it says **pending card transaction**, wait a few days for it to finish fully merging to concur. It will automatically change to University Travel Card and that is when it can be added to a report for processing.

| Receipt | Payment Type | Expense Source | Expense Type | Vendor Details | Date | Amount |
|---------|--------------------------|----------------|---------------------------|--------------------|------------|--------------|
| | Pending Card Transaction | Expenselt | Food & Beverage 8 or less | Himalayan Bank Ltd | 08/14/2024 | INR 4,725.00 |

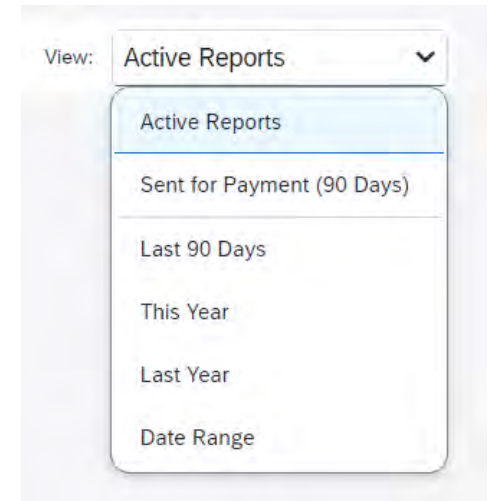
- If it says **please select payment type**, it is just a receipt and you need to wait for the corresponding card transaction to enter concur. Or if you already submitted the card transaction, then this is an extra receipt that can be deleted. Or it could be the receipt for an item you paid for out of pocket and you need to change the payment type.

5. How do I see my older requests? Change the view (located right side of screen) and click the drop-down menu.

You can select All Requests, Approved, Not Submitted, etc.



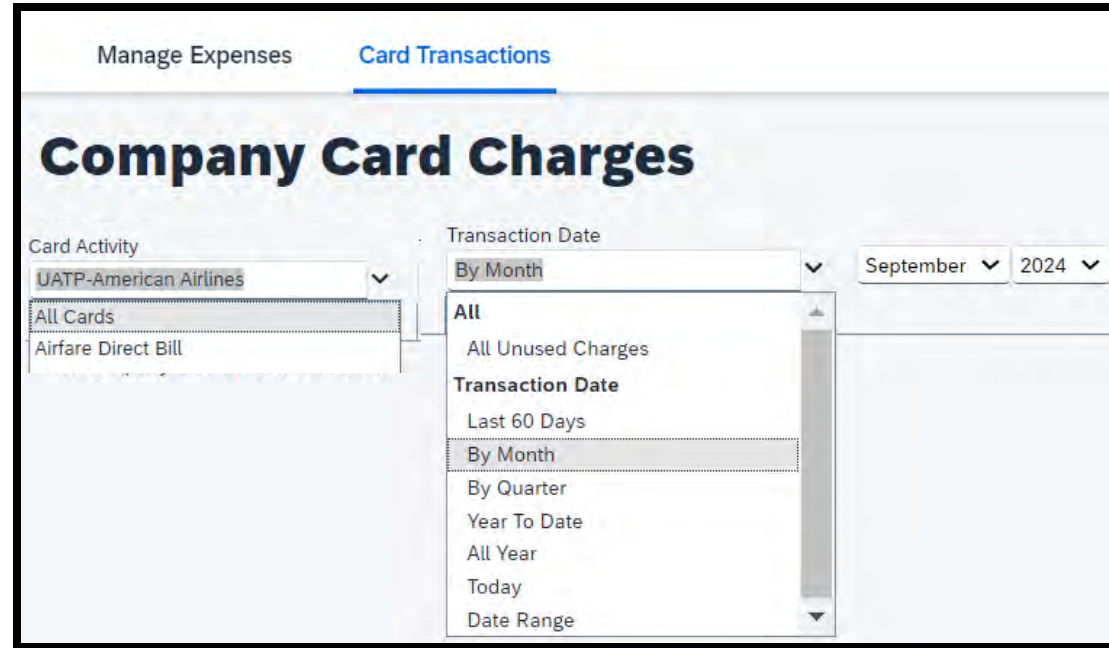
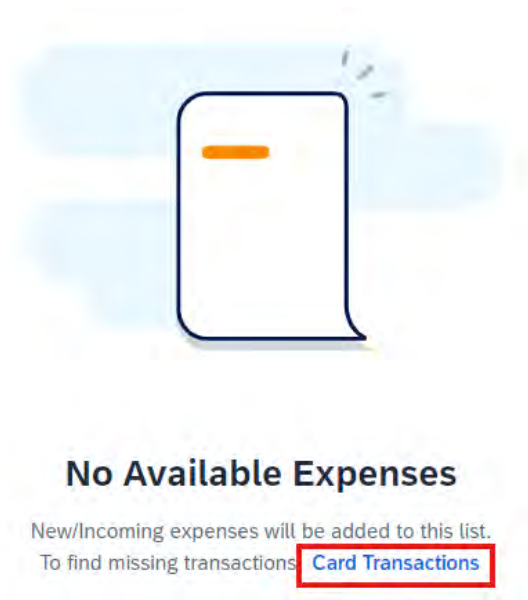
Older reports? Change the view to select the time range that suits your needs.



6. Why am I getting email reminders when I already submitted the expense report? There is an item that still needs to be addressed. Examples:

- You have an active travel request that doesn't have any expenses associated with it.
- You have an outstanding transaction that needs to be submitted for reimbursement.

7. How can I find if I already submitted an expense? Card Transactions feature. You can search by card and timeframe.

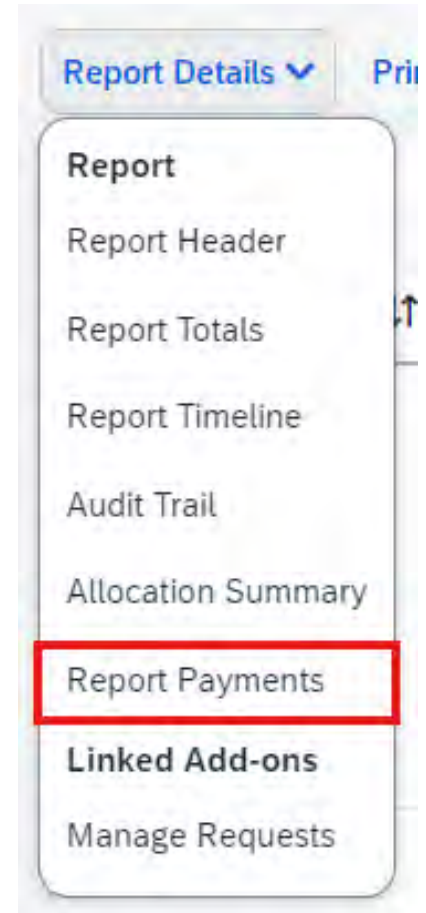


8. How to find Report Totals/Payments/Timeline?

- **How & when will I get paid?** If you have a bank account set up with the University payroll, your reimbursement will be direct deposited (ACH). If not, your funds will be mailed via paper check to the address on file in the campus [Directory](#).

To see an estimated date when it will be paid, click **Report Details > Report Payments**. If there is no date listed yet, it may be queued for processing but not yet initiated, so check it again in a day or two.

| Payment Date↓↑ | Import Run Number | Check/EFT | Payment To↓↑ | Amount↓↑ |
|----------------|-------------------|------------|--------------|----------|
| 07/12/2024 | 47710 | 0000686705 | [REDACTED] | \$351.20 |



June Expenses (06/01/2024) \$2,725.86

Sent for Payment

Report Number: D2Q0KF

Sent for payment indicates payment was sent to Travel Card/Airfare Direct Bill.

Dataverse Community Meeting \$2,510.79

Payment Confirmed

Report Number: 6B0AAK

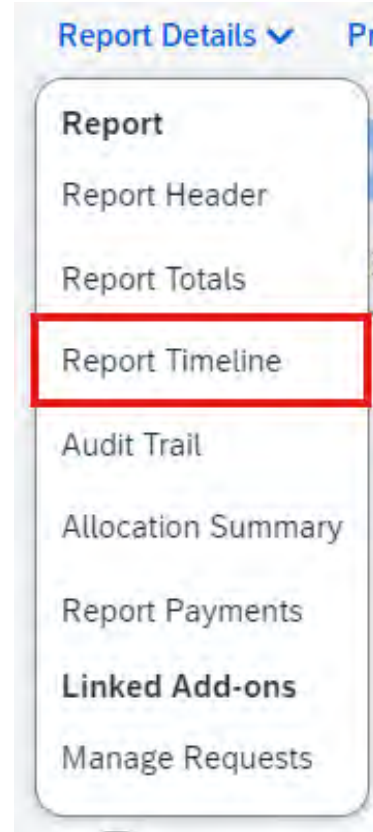
Payment Confirmed indicates personal reimbursement has been paid to you.

- **When will the Report be approved?**

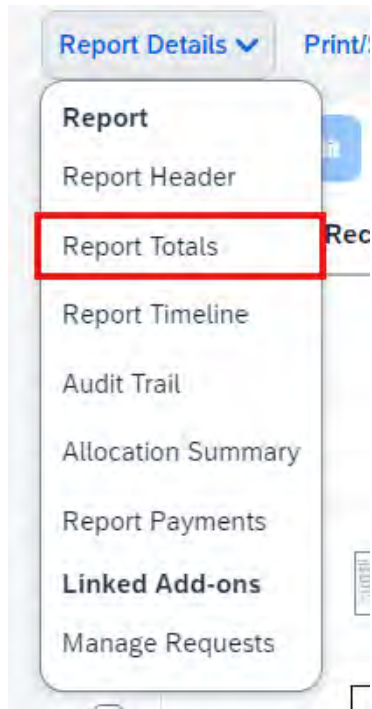
Report Details > Report Timeline will show where it is in the approval process.

For each report there are at least two approvals required at the dept level. Additional approval steps are added if the CFS includes federal funding (OSR), international travel, or if your dept requires your supervisor's approval. If more than one dept is being charged, then approvers from the second dept will be included too.

If it is in the travel team queue, please email travel_team@unc.edu for further status inquiry.



- **How much is my reimbursement?** **Report Details > Report Totals** will show a breakdown of how much will be paid to the T&E card balance and to the traveler. It also shows if you owe anything to the University for items marked as personal.



A screenshot of a 'Report Totals' window. The window title is 'Report Totals' with a close button (X) in the top right corner. The content is divided into two main sections: 'Company Payments' and 'Employee Payments'. Below these are three columns of summary data.

| Report Totals | | |
|--|---|--|
| Company Payments | | |
| \$2,018.93 | | |
| Employee | | |
| <hr/> | | |
| Employee Payments | | |
| \$0.00 | | |
| Company | | |
| Amount Total: \$2,252.00 | Due Employee: \$2,018.93 | Owed Company: \$0.00 |
| Less Personal Amount: \$233.07 | | |
| <hr/> | <hr/> | <hr/> |
| Requested Amount: \$2,018.93 | Total Paid By Company: \$2,018.93 | Total Owed By Employee: \$0.00 |

A 'Close' button is located in the bottom right corner of the window.

News & Alerts:

- [Daily Allowance Update:](#)
 - Intuitive itinerary creation
 - An adjustments page which allows for simpler updates
 - A reimbursement details page which shows rates and calculations
 - A reimbursable allowances summary page that shows a detailed breakdown of lodging expenses vs allowable limits
 - In addition, the Travel Allowance wizard will now be integrated with Concur Requests
- [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.
- [Mileage Policy:](#) Over 350 miles – IRS reimbursement rates \$0.67 & \$0.335. For over 750 miles flight cost comparison required at least 21-days prior to trip depart date or business justification for necessity to drive.
- [Taxation/Accountability Plan:](#) 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.

30 days: submit your out-of-pocket expenses

60 days: out-of-pocket expenses are reimbursed but taxed

180 days: cannot reimburse out-of-pocket expenses

Fall 2024 Concur Office Hours and Business Officer Training

August 14, 2024

<https://finance.unc.edu/news/2024/08/14/fall-2024-concur-weekly-office-hours-and-monthly-business-officer-training/>

Drop-In Office Hours

Join Concur support's weekly virtual office hours via [Zoom](#). Registration is not required. Questions regarding business travel and expense are encouraged!

| Date | Time | Main Topic |
|------------------|------------|--|
| Tuesday, Nov. 5 | 2 – 4 p.m. | Navigation and Follow-Up |
| Tuesday, Nov. 12 | 2 – 4 p.m. | Travel Requests |
| Tuesday, Nov. 19 | 2 – 4 p.m. | Expense Reports – Part I |
| Tuesday, Nov. 26 | 2 – 4 p.m. | Expense Reports – Part II |
| Tuesday, Dec. 3 | 2 – 4 p.m. | Navigation and Follow-Up |
| Tuesday, Dec. 10 | 2 – 4 p.m. | Travel Requests and Expense Reports – Part I |
| Tuesday, Dec. 17 | 2 – 4 p.m. | Expense Reports – Part II and Navigation and Follow-Up |

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

Please contact WorldTravel at (877) 602-4950 or
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

CONCUR TRAVEL - HELPFUL LINKS

Hold Control button and click link to open.

| LINK | TRAVEL POLICY & PROCEDURES |
|-------------------------|-----------------------------------|
| T&E | Travel guide, checklist, and FAQs |
| FORM | Forms library |
| INTL | International travel |
| GRP | Group & Guest travel |
| POL | Policies & Procedures |
| TAM | Travel Allowance & Mileage |

| LINK | CONCUR TRAINING |
|----------------------|---|
| CONC | Concur instruction pdfs & training videos |
| HELP | Submit Help Ticket for 1:1 assistance |
| OFC | Office Hours for weekly drop-in Q&A |
| WEB | Webinar registration for deep-dive training |

CONTACTS

World Travel (877) 602-4950
uncch_travel@worldtravelinc.com

travel_team@unc.edu

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.