

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

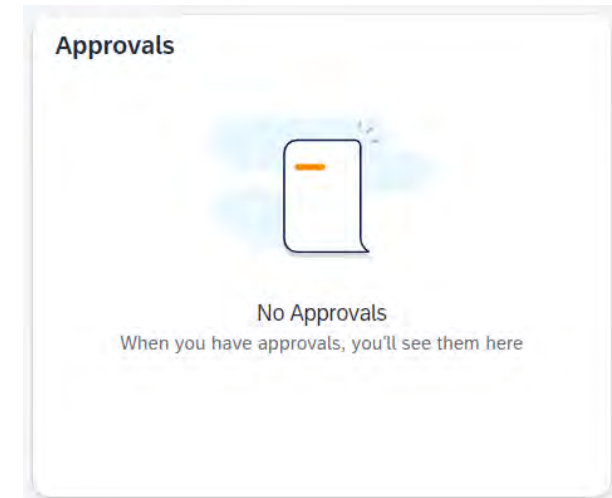
Week 4 – Navigation and Follow Up

Travel Team, Travel Card Services, & Concur Support

- When should I reach out to the Travel Team?
 - If your question is policy related, or are questioning the policies/steps for your trip
 - Ex. Unsure about flight cost comparison being required, questions about WebTravel, when reports will be processed, cash advances or non-hotel lodging
- When should I reach out to the Travel Card/P-Card Team?
 - If your question is relating to the Travel & Expense card or P-Card
 - Ex. Your card has been suspended, you suspect a fraudulent transaction, or you need to increase your spending limit for P-Card
- When should I reach out to the Concur Support Team?
 - If your question is about the navigation and functionality of Concur
 - Ex. How to create a travel request/expense report, resolving error messages, or uploading correct documentation

Travel Request/Expense Report Approvers

- Travel Request and Expense Report Approvers have three 10-day windows to review & approve
 - This will eventually time out and will be sent back to the traveler and will go through the workflow timeline again
- Please look at requests: if there's only airfare, reach out to traveler to confirm if this is the only estimated expense
- Please look at reports: if there's overnight travel/claiming daily allowance- look for attached travel request
 - Bank/credit card statements are not acceptable receipts



A screenshot of a software interface titled "Approvals". It has two tabs: "00 Requests" and "00 Expense Reports", with the latter being selected. Below the tabs is a table with the following columns: "Report Name", "Employee", "Report Date", "Amount Due Employee", and "Requested Amount". The table is currently empty, displaying "No records found." at the bottom.

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
No records found.				

Week 1: Travel Requests

FREQUENTLY ASKED QUESTIONS

1. Why do I need to create a Travel Request?
2. What is the difference between Request and Report?
3. How do I know what documents are required?
4. What is a cost comparison for, and how do I get one?
5. When can I book travel?
6. When will my request be approved?
7. Do I have to book through Concur?
8. Can I book the hotel through the conference site?
9. Can I book an apartment or Airbnb instead?
10. When do I use T&E card vs P-Card vs personal credit/debit card?

TIPS

- If you think it will be incurred on your trip, list it! It is better to have it and not need it, than to need it and not have it.
- Submit requests at least 2 weeks prior to domestic travel and 3 weeks for international travel.
- Requests will go through AT LEAST two steps of approval:
 - 1st Dept. Designated Approver
 - 2nd Business Office Approver
- If you need to make changes to your request after submittal, you can recall it.

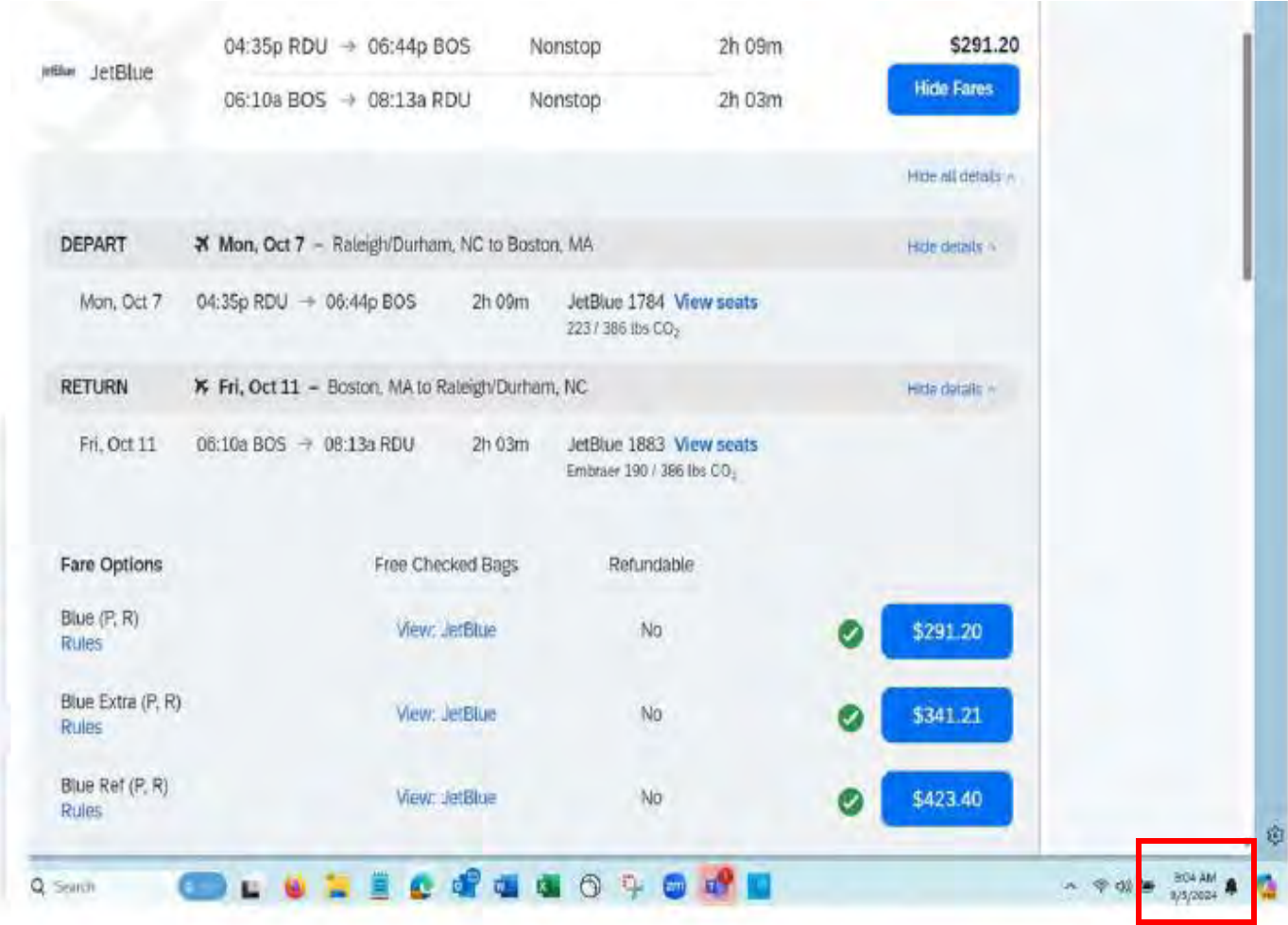
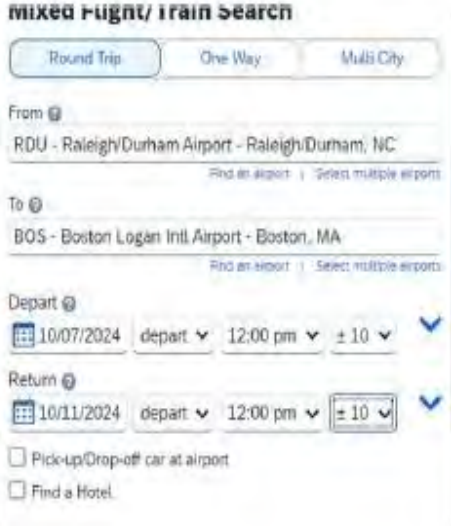
1. **Why do I need to create a Travel Request?** For departmental pre-approval of the trip, and for their budgeting purposes. It is only an estimate and does not encumber any funds. You should create this as soon as you know you will be travelling. **TIP:** you'll need to get your estimates for airfare and hotel before you begin entering the Request.
2. **What is the difference between Request and Report?** The Request is just for informational purposes, while the Report is the actual transactions that occurred. **TIP:** Add expense lines for everything you think you might need, even if you end up not using it on the expense report later. **TIP:** Submit at least 2 weeks prior to domestic travel and 3 weeks prior to international travel. **TIP:** if you need to make changes to the request after you submit it, you can RECALL it, but it will need to start at the beginning of the approval process again.
3. **How do I know what documents are required?** The [Finance website](#) has guidelines and FAQs. In the [Forms Library](#) scroll down to the bottom for Travel (1500) and Expenses (1200).
4. **What is a cost comparison for, and how do I get one?** It is a flight or hotel quote that the travel team requires. There is a QRC available or contact the travel team, or call World Travel.
 - For example, if you are driving over 750 miles round trip, you'll need to attach a flight comparison to give the approvers an idea of what it would have cost to fly vs drive. You'll be reimbursed mileage up to the cost of the airfare.
 - The other common example is staying at an Airbnb or apartment for long term trips, you would submit two quotes for nearby hotels in addition to the actual cost of the Airbnb, to show the cost savings.

Cost Comparison Example

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.



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.

Selected Fare

Carrier	Flight	Class	Duration	Price	Buttons
JetBlue	04:35p RDU → 06:44p BOS	Nonstop	2h 09m	\$426.20	Remove X Hide Fares
JetBlue	08:55p BOS → 11:07p RDU	Nonstop	2h 12m		

DEPART ✕ Mon, Oct 7 – Raleigh/Durham, NC to Boston, MA. [Hide details](#)

Date	Flight	Duration	Aircraft	CO ₂
Mon, Oct 7	04:35p RDU → 06:44p BOS	2h 09m	JetBlue 1784	223 / 386 lbs CO ₂

RETURN ✕ Sun, Oct 13 – Boston, MA to Raleigh/Durham, NC. [Hide details](#)

Date	Flight	Duration	Aircraft	CO ₂
Sun, Oct 13	08:55p BOS → 11:07p RDU	2h 12m	JetBlue 783	223 / 386 lbs CO ₂

Fare Options Free Checked Bags Refundable

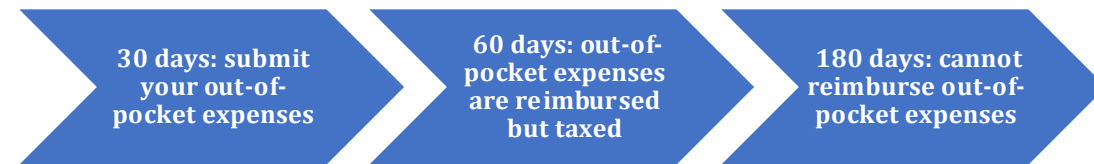
Blue (P, D)

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.

- 5. When can I book travel?** As soon as the travel request is approved. If you need an exception, email the travel team.
- 6. When will my request be approved?** The process can take several weeks as it requires *at least 2 approvals* by your department designated and business office approvers. Additional approvers will be added for federally funded trips (OSR approval) and international travel. The final step is review and approval by the Travel Team. You can see the approval history in a report under Report Details > Report Timeline. If the report is pending review by the travel team, email them directly to inquire about status and ETA.
- 7. Do I have to book through Concur?** Yes. However, there are a couple of exceptions: see #8 and #9.
- 8. Can I book the hotel through the conference site?** Yes, UNC prefers that you book your conference hotel through the conference website link, as they have a block of rooms reserved at a reduced rate. No cost comparison is required. Attach a copy of the conference details and agenda to the travel request and again on the expense report.
- 9. Can I book an apartment or Airbnb instead?** Yes, for long-term trips it can be more cost-effective to book an apartment or Airbnb instead of a hotel. The two hotel cost comparison quotes will reflect this and should be attached to the Travel Request and again on the expense report.
- 10. When do I use T&E card vs P-Card vs personal credit/debit card?** The Payment Card Services site <https://finance.unc.edu/services/card-services/> has a reference document. There is also a pdf showing how to pay expenses by traveler type (faculty staff vs students or guests).

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
- [Mileage Policy](#) : Over 350 miles – IRS reimbursement rates \$0.67 & \$0.335. For over 750 miles flight cost comparison required 21 days prior to trip 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.
- [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.



Fall 2024 Concur Office Hours and Business Officer Training

August 14, 2024

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

May Morgan will join on Nov 19th



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.