

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 2: Expense Reports – Part 1

FREQUENTLY ASKED QUESTIONS

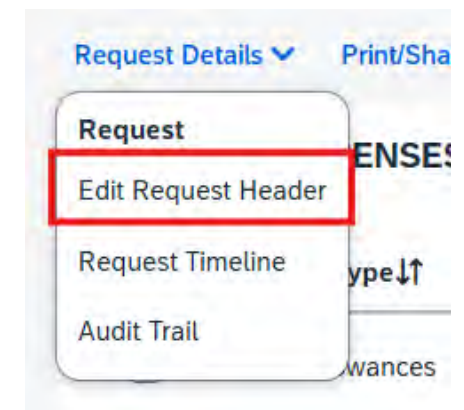
1. Can I book a hotel that exceeds the excess lodging rate?
2. Should I include lodging being paid by third party?
3. What information is needed for flight cost comparison?
4. How do I know if this is Group/Student Travel?
5. How do I create an expense report?
6. How do I add expenses? Electronic vs. Out of Pocket
7. 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.

Lodging & Accommodations

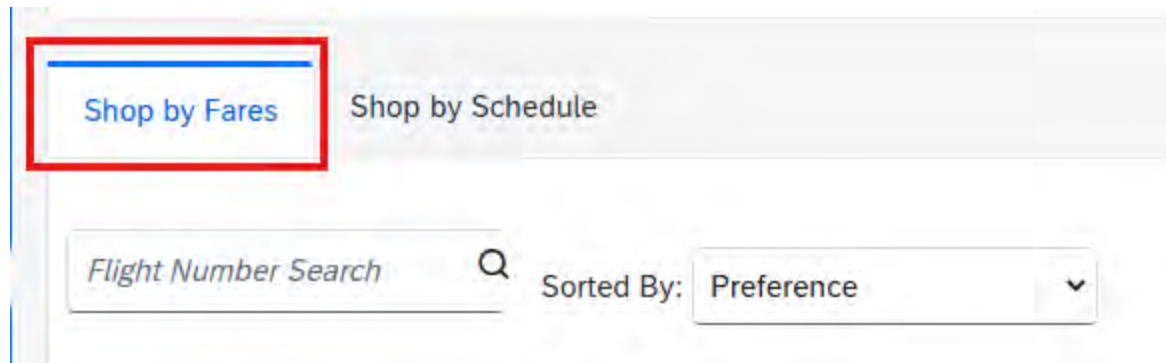
1. Can I book a hotel that exceeds the excess lodging rate? Update on excess lodging – provide an explanation, this doesn't mean you can't book the hotel
 - You do not need permission to book conference rate hotel
 - Okay to share a room with faculty member – be sure to include their first/last name in expense line
2. Should I include lodging being paid by third party? Lodging being paid by 3rd party only – still include in travel request
 - This can be included as a \$0 estimated expense
 - You do not need to provide documentation if staying with family/friends
 - You can provide comments in report/request header



Travel Team Reminders

3. When combining business and personal airfare, it should be done AT THE SAME TIME as booking the trip

- Must be same seating, airline, days of the week and times of day, etc.
- Cost comparison must be created within Concur, and include date and time in screenshot
- Be sure to go through the entire trip to the end quote, not just list possible fares.



*Trip protection and seat upgrades are not reimbursable expenses and must be paid for personally

Contact WorldTravel at (877) 602-4950 for assistance with flight cost comparison

Payment Type & Group Travel Form

Type of Expense	Permanent Employees	Temporary Employees (including postdocs)	Student Travel (including fellows, grad students, and residents) with Form	Guest Travel with Form	Form to Submit
Airfare*	T&E Card or Direct Bill Card	Direct Bill Card	CABS	CABS	Guests must be setup as vendor/supplier by submitting their W9 to A/P.
Conference Registration	T&E Card or P-Card	P-Card	P-Card	P-Card	Not Applicable
Lodging**	T&E Card or Out of Pocket (OOP)	OOP	T&E Card or P-Card***	P-Card	Guest Travel Pre-Approval Request Form or Student Travel Pre-Approval
Ground Transportation	T&E Card or OOP	OOP	T&E Card or P-Card***	P-Card	Guest Travel Pre-Approval Request Form or Student Travel Pre-Approval
Rental Car (including fuel expenses)	T&E Card or OOP	OOP	OOP	OOP	Not Applicable

Links to documents:

[Payment by Traveler Type](#)

[Group Travel Request Form](#)

[Forms Library](#)

*If paying for Airfare Block Space for group travel, a P-Card may be used to complete payment upon request. Please email pcard@unc.edu for assistance.

**If paying for group lodging for multiple travelers, the [Group Travel Request Form 1501.6.2f](#) should be completed and submitted to pcard@unc.edu or travelcard@unc.edu to request permission to use your card.

***If a student is traveling with a T&E Card accountholder, the T&E Card may be used to pay for student lodging. If a student is not traveling with a T&E Card accountholder, a P-Card may be used.

FINANCE AND OPERATIONS
Finance and Budget
Group Travel Request Form 1501.6.2f

Instructions: If paying for group lodging for multiple travelers, submit this completed form to pcard@unc.edu or travelcard@unc.edu to obtain permission to use your P-Card or Travel and Expense (T&E) Card. Please attach additional sheet if needed to include more travelers.

Accountholder: _____ Card Type: _____ Last 4-digits of Card Number:

Date(s) of Travel _____ through _____

Purpose of Travel:

Anticipated Expenses
Reasonable estimates are acceptable and please include an agenda if available.

Lodging Expenses: _____ Transportation Expenses: _____ Other Expenses: _____

Details of other anticipated expenses:

Justification for why group Payment is being allowed:

Names & Status of All Group Travelers

Traveler: _____ Non University Affiliate Student Faculty/Staff
First Name Last Name

Traveler: _____ Non University Affiliate Student Faculty/Staff
First Name Last Name

Traveler: _____ Non University Affiliate Student Faculty/Staff
First Name Last Name

Traveler: _____ Non University Affiliate Student Faculty/Staff
First Name Last Name

As the Accountholder, my signature below authorizes charges to my P-Card/T&E Card account for business-related lodging expenses, incurred during the dates of travel provided for the guests listed above.

Accountholder Signature

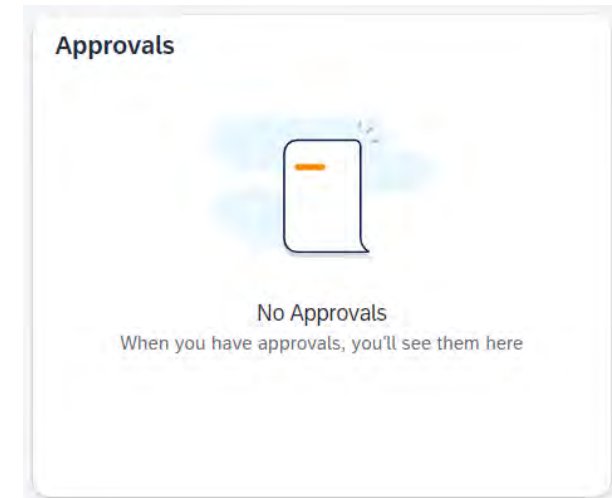
Date

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

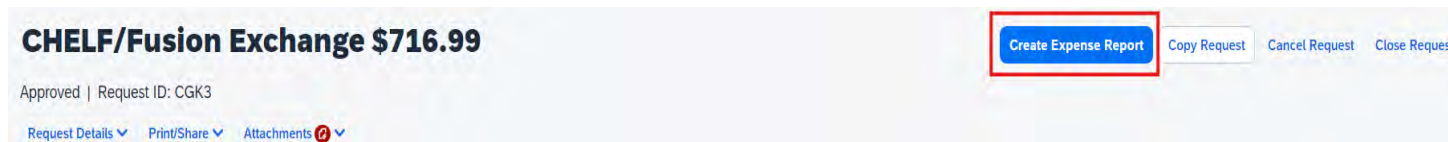


A screenshot of a software interface titled "Approvals". It has two tabs: "00 Requests" and "00 Expense Reports", with the latter being selected. Below the tabs is a table with the following columns: "Report Name", "Employee", "Report Date", "Amount Due Employee", and "Requested Amount". The table is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

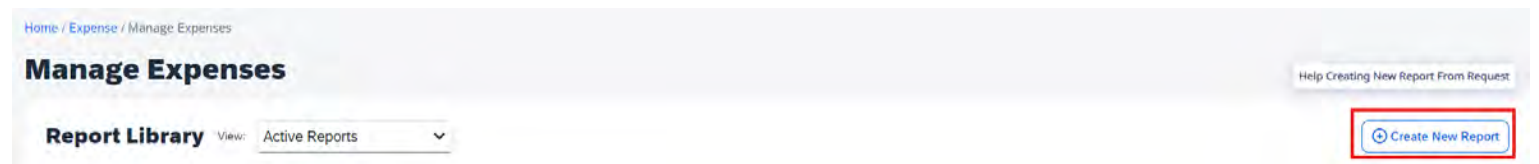
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
No records found.				

5. 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.







6. 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.

The screenshot displays a report titled "New York Conference 2024 \$4,134.82" with a status of "Not Submitted" and report number "FKN0GN". The interface includes navigation options like "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". A "View Available Receipts" link is also present. The main section shows "Expenses" with a "View: Standard" dropdown. A red box highlights the "Add Expense" button in the top right of the main area. Below this, a modal window titled "Add Expense" is open, showing a table of "Available Expenses (1)". A red box highlights the "Payment Type" column in the table. At the bottom right of the modal, another red box highlights the "Add To Report" button.

<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	...

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.

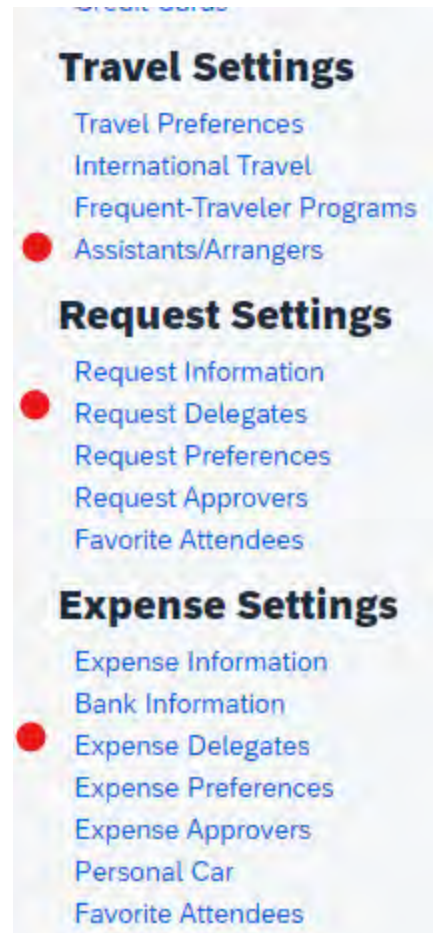
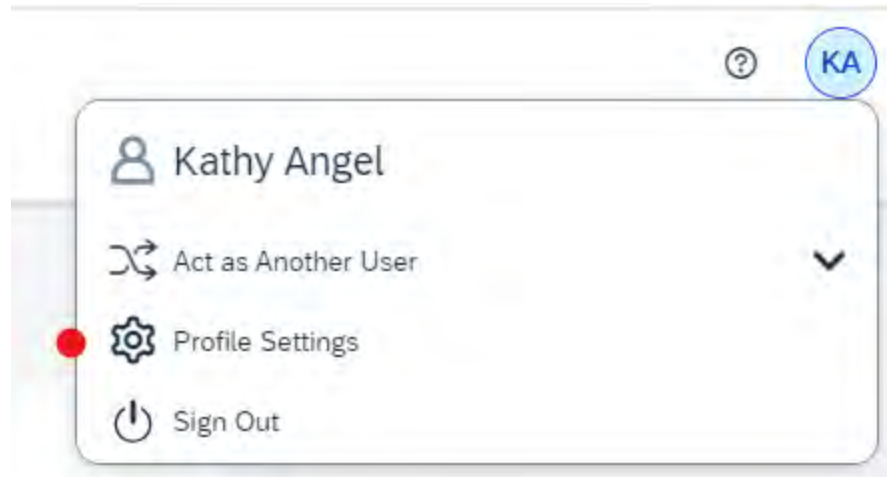
SCTEM Conference 2024 \$1,363.14 Recall Report Copy Report

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](#)

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.



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).

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

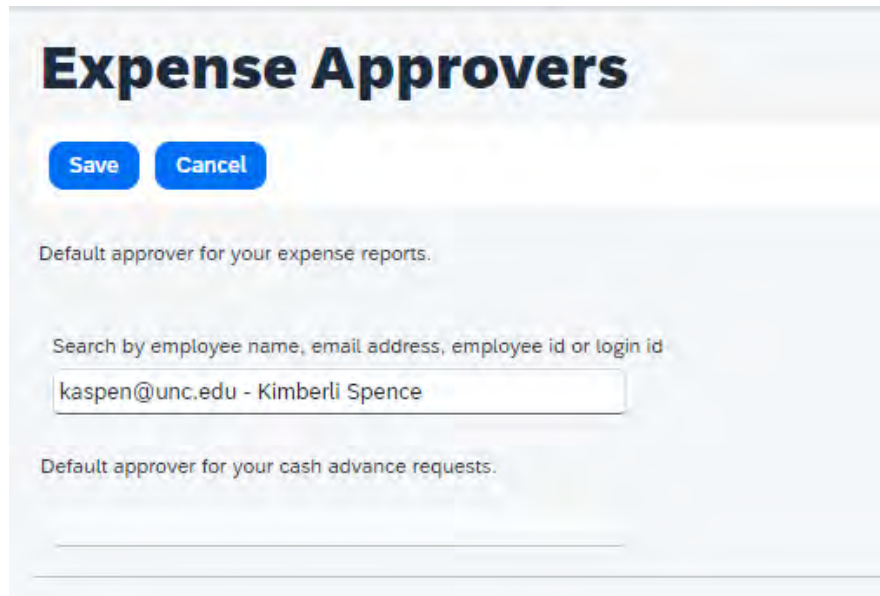
Delegates are employees who are allowed to perform work on behalf of other employees.
 You may assign a temporary approver for a maximum of 120 days.
 Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<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

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

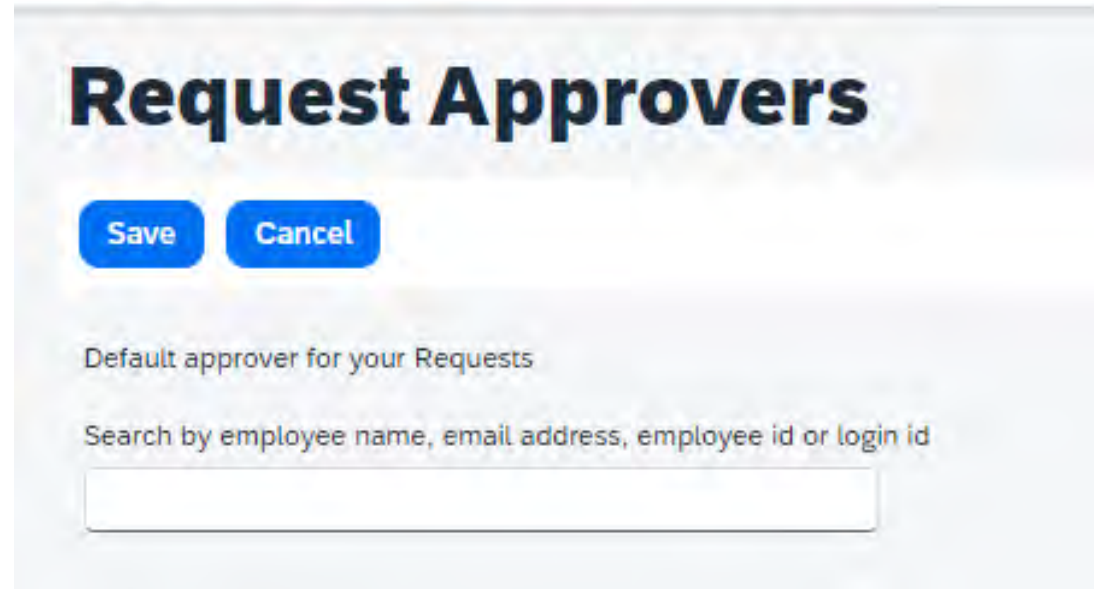
Save Cancel

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.



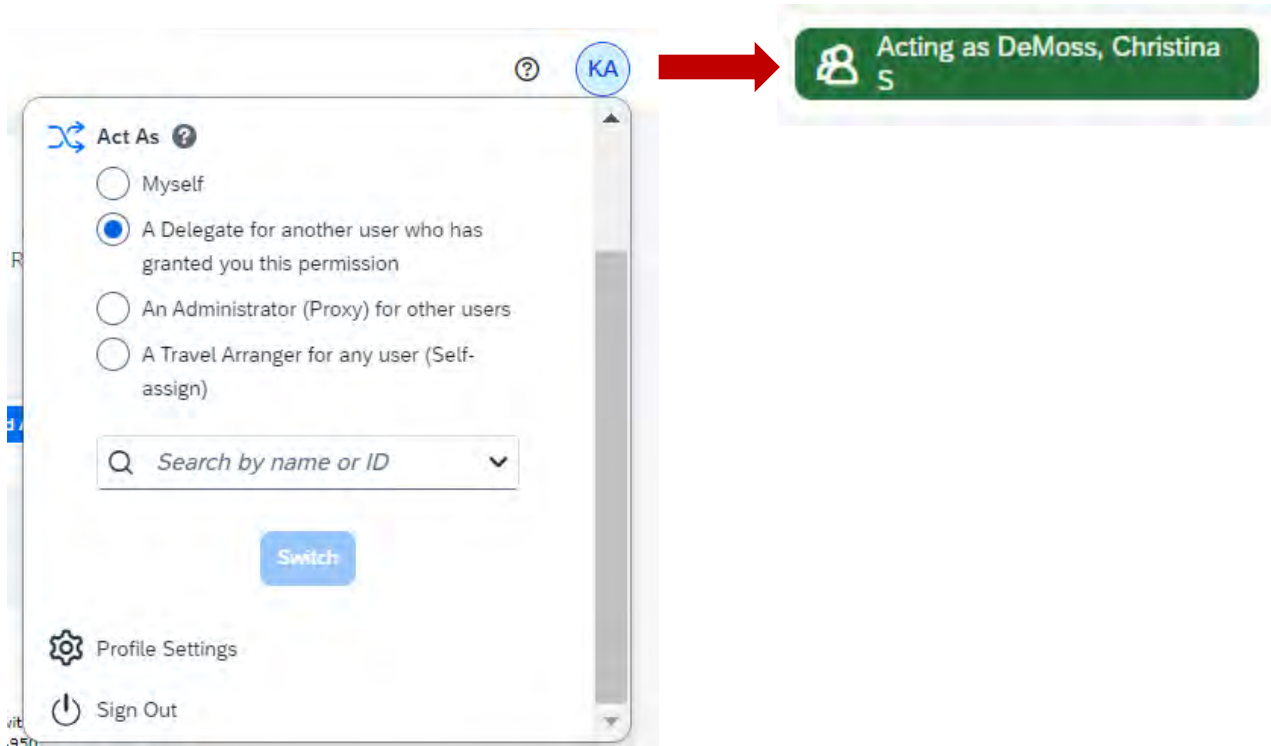
Request Approvers

Save Cancel

Default approver for your Requests

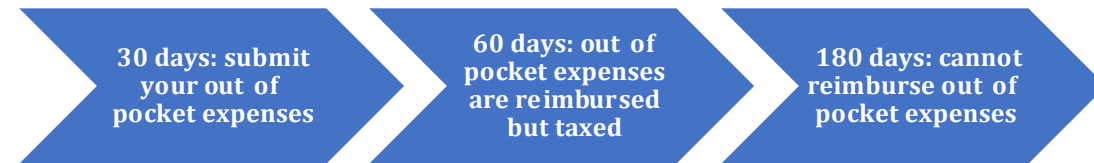
Search by employee name, email address, employee id or login id

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.



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.



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.

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
- 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

- 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 or 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