

# Concur Business Office Webinar

---

Presented by:

Kimberli Spence (Concur Support Desk Supervisor)

&

Christina DeMoss (Concur Support Desk Associate)



# In this Webinar we will go over:

## Travel Requests:

What information is needed

## Travel Accommodations:

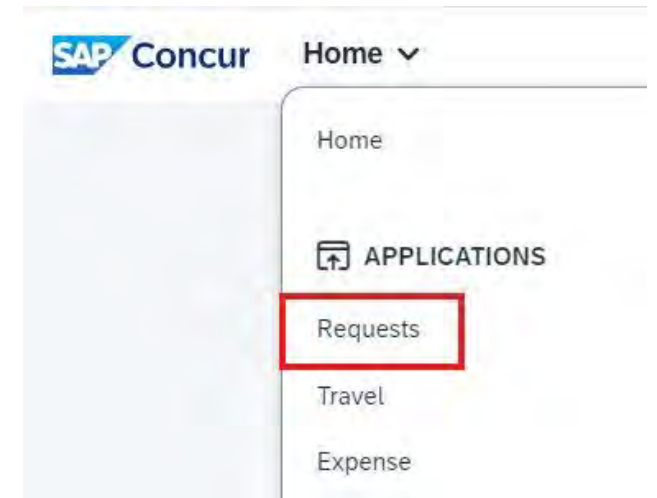
Profile, policies & procedures

## Expense Reports:

Reconciliation & reimbursement

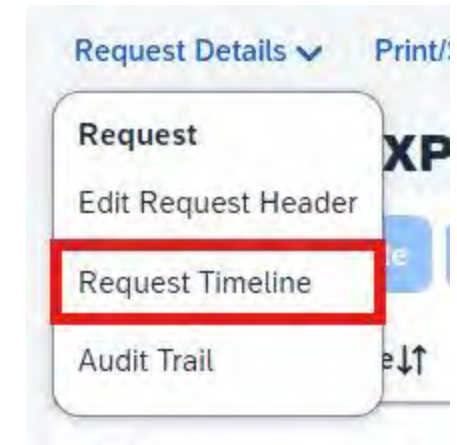
# Travel Requests

- What is a travel request?
  - Pre-authorization required for all overnight travel, or day travel which includes airfare, for University Faculty and Staff
  - Not required for day trips with mileage or meeting meals
- What expected expenses need to be on a travel request?
  - “Big 5”: airfare, hotel/lodging, conference/event registration fees, daily allowance (per diem), & ground transportation
- When should I submit my travel request?
  - We recommend AT LEAST 2 weeks prior for domestic travel, 3 weeks prior to international travel



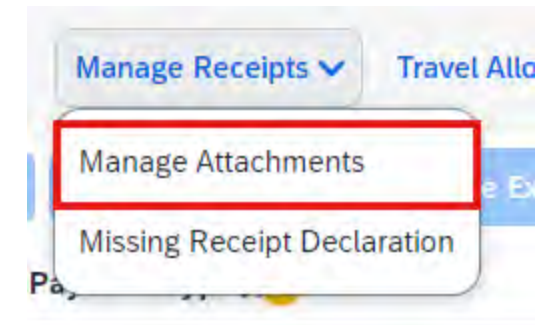
# Travel Requests cont.

- Approval Workflow Timeline:
  - 1<sup>st</sup> Default/Supervisor if set up or Dept. Designated Approver
  - 2<sup>nd</sup> Business Office Approver
  - \*3<sup>rd</sup>/4<sup>th</sup>/5<sup>th</sup> Office of Sponsored Programs (OSP), Export Control, UNC Global
- Can I change my travel request after it's been approved?
  - Yes, if the dates of travel are in the future, and if it's not linked to an expense report - It must go through approval workflow again
- My travel request is approved, can I book my trip?
  - Yes, once your request is fully approved you can: book flights, hotel deposit, rental car reservation, etc.
  - When booking flights (in Concur or with World Travel) you will need the 4-digit Request ID



# Travel Requests – Additional Info

- What documentation is needed?
- [International Travel Approval Form](#) – when travelling international for University-related business, you will complete & attach this form and will be approved by UNC Global Affairs
- Third-party lodging (Airbnb, VRBO, rental) – complete and submit [1501.6 Non-Hotel Lodging Authorization Request](#) to [travel\\_team@unc.edu](mailto:travel_team@unc.edu) with two hotel cost comparisons in the area or near your event
  - This approval form & approval email is to be attached to both request & expense report
  - Best practice is to add your conference/seminar event agenda to Travel Request



# Travel Profile & Booking

- How can I set up my travel profile?
  - Check your Concur profile: verify email, gender, date of birth, passport information, forms of payment, travel assistant, etc.
- Who can I contact for travel booking assistance?
  - Speak to a live agent call WorldTravel at (877) 602-4950 or email [uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)
- What are some things to look out for when booking travel?
  - Reimbursable expenses: luggage fees, Wi-Fi, seat upgrades (with an approved medical accommodation from the EOC)
  - Non-Reimbursable expenses: trip protection, seat upgrades
  - Personal days/booking outside of Concur: contact WorldTravel/Travel Team for flight cost comparisons

## Your Information

Personal Information  
Company Information  
Contact Information  
Email Addresses  
Emergency Contact  
Credit Cards

# Acting as a Travel Assistant

- What can I do as a Travel Assistant?
  - Book travel and modify current itineraries on behalf of the traveler
  - Contact WorldTravel and make changes to itinerary
  - Edit the travelers' profile settings
  - Even if you're not booking travel, being assigned as a Travel Assistant will grant you access to flight/hotel invoices for easier expense report reconciliation
- How am I added as a Travel Assistant?
  - In Profile settings, under 'Assistants and Travel Arrangers' by the end user

**Assistants and Travel Arrangers** **Go to top**

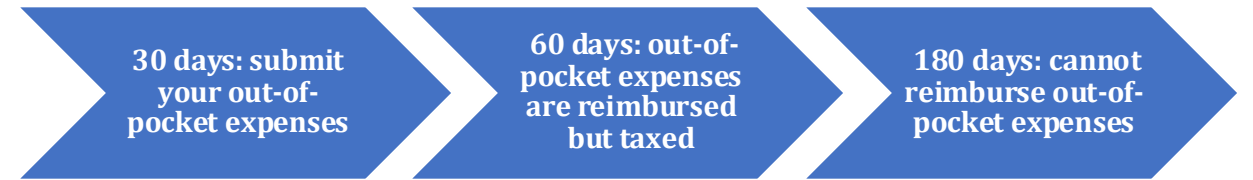
---

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers [+ Add an Assistant](#)

# Expense Reports



- What is an Expense Report?
  - Pre-trip report: airfare, hotel deposit, conference/seminar registration fees, prepaid parking on University Travel Card or Airfare Direct Bill Card
  - Post-trip report: ground transportation, daily allowance, itemized hotel expense, personal car mileage, etc.
- Why are there two expenses for the same transaction?
  - E-Receipts are automatically generated the day of booking or of exchange. It can take approximately 3-5 business days to merge with credit card transaction (displayed as \*PLEASE SELECT PAYMENT TYPE for Airfare Direct Bill or Pending Card Transaction for University Travel card\*) unless it is no cost exchange
- When should I submit my expenses?
  - University T&E card/Airfare Direct Bill transactions: 30 days from date of transaction or 30 days from last day of travel – whichever comes first
  - Out-of-Pocket transactions (post-trip): 30 days after the last day of travel

Payment Type \*

\*PLEASE SELECT PAYMENT TYPE



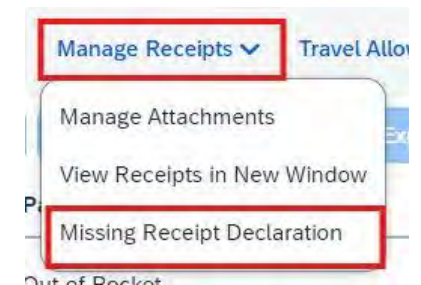
Pending Card Transaction



# Expense Reports cont.

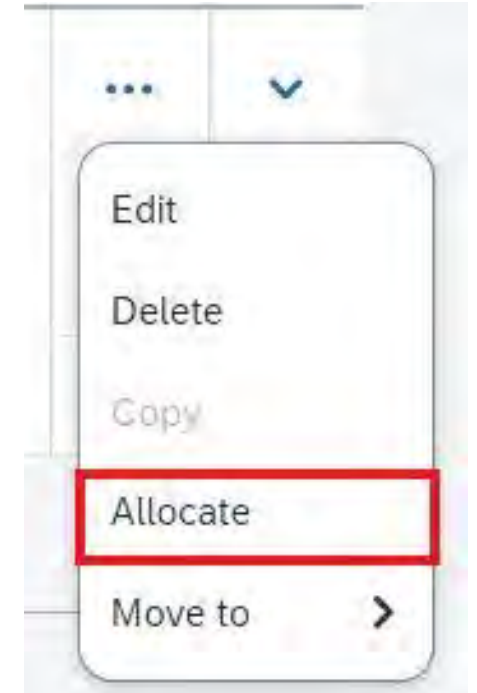
- Purchasing a flight outside of Concur – Review [1501.3 Procedures for Air Travel](#)
  - Must justify purchasing flight by providing flight cost comparison to show a \$25 domestic/\$100 international savings
  - Must use your personal credit/debit card, cannot be reimbursed until trip completion
- Do I need a receipt for all transactions?
  - Yes: airfare, hotel/lodging, car rental & conference/event registration fees, **AGENDAS ARE ENCOURAGED TO BE ATTACHED TO EXPENSE REPORT IF AVAILABLE**
  - No: daily allowance (per diem), mileage, Non-Reimbursable/Personal Expense
- Missing Receipt Declaration
  - Must be completed electronically within Concur by traveler
  - Cannot be used for airfare, hotel, car rental, or conference/seminar fees
  - Delegate/Admin Assistant does not have access to create in report

Receipt↑	Payment Type↓	Expense Type↓
	Airfare Direct Bill	Airfare Reservation
	*PLEASE SELECT PAYMENT TYPE	Airfare
	University Travel Card	International Transaction Fee (T&E Card Only)



# Expense Reports - Non-overnight Travel

- Should I submit an expense report containing day travel?
  - Yes, this can include: business meals, daily personal car mileage, attending a conference/seminar w/no overnight travel
- Best practices:
  - Consolidate all non-overnight travel expenses into ONE monthly report and submit
  - Enter a Chart Field String (CFS) on the report header, and individual expenses can be allocated as necessary
- Non-overnight travel does not require a travel request (unless requested by your dept.)



# Expense Reports - Expense Types

- Airfare – flight invoice
  - Baggage, Wi-Fi
- Hotel/Lodging - itemized receipt
  - Booking through conference at negotiated rate/room blocks
  - Itemizations: applying deposits, marking expenses as 'Non-Reimbursable/Personal Expense'
- Daily Allowance (per diem)
  - Creating a travel itinerary (2 lines required)
  - Indicating which meals were provided, and NOT paid out-of-pocket
  - Check boxes for use percent rule
- Personal Car Mileage
  - No travel request required (unless requested by dept.)
  - Making round trip – one line item for each trip, can't split up
  - Exception: Data Collectors option is special as they receive full reimbursement rate

# Acting as an Expense Delegate

- Expense Delegates - CAN
  - Prepare travel request and expense reports (add receipts, allocation, itemization)
  - Can ONLY submit travel requests – if permission is granted by traveler
  - Reach out to Concur Support for alerts & warnings on report
  - Notify traveler report is ready for review & submission
  - Get status updates on submitted expense reports
  - Can work with Travel Team on returned reports for correction
- Expense Delegates – CANNOT
  - Submit expense reports for approval
  - Complete electronic Missing Receipt Declaration

# Q&A

**Next Business Office Monthly Webinar  
Thursday, 10/24/24 8:30am – 10am  
Register in Carolina Talent (search for Concur)**

**\*Special guest speaker – Rebecca Spanos, Director of Travel Services sharing new & exciting updates to Concur\***

# Concur Support Virtual Open Office Hours upcoming

## Fall 2024 Concur Office Hours

Date	Time	Main Topic
Tuesday, Aug. 20 	2 – 4 p.m.	Travel Requests
Tuesday, Aug. 27 	2 – 4 p.m.	Expense Reports – Part I
Tuesday, Sept. 3  (Video Recording)	2 – 4 p.m.	Expense Reports – Part II
Tuesday, Sept. 10  (Video Recording)	2 – 4 p.m.	Navigation and Follow-Up
Tuesday, Sept. 17  (Video Recording)	2 – 4 p.m.	Travel Requests
Tuesday, Sept. 24  (Video Recording)	2 – 4 p.m.	Expense Reports – Part I
Tuesday, Oct. 1	2 – 4 p.m.	Expense Reports – Part II
Tuesday, Oct. 8	2 – 4 p.m.	Navigation and Follow-Up
Tuesday, Oct. 15	2 – 4 p.m.	Travel Requests
Tuesday, Oct. 22	2 – 4 p.m.	Expense Reports – Part I
Tuesday, Oct. 29	2 – 4 p.m.	Expense Reports – Part II
Tuesday, Nov. 5	2 – 4 p.m.	Navigation and Follow-Up

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!

# 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 email

[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)

## **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)