



FINANCE AND OPERATIONS
Finance and Budget

Concur

Travel and Expense Management



Step-by-Step Guidebook

May 21, 2024

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1. About Concur

Concur integrates travel requests, expense reporting, travel booking, and authorization solutions. This web-based service provides the tools you need to request and book travel, as well as create, and submit expense reports. This system will replace former travel request, booking, authorization, and expense systems for the University of North Carolina at Chapel Hill (UNC-Chapel Hill).

Features and Highlights

This user-friendly system incorporates features that are unique to UNC-Chapel Hill creating a seamless experience from request to booking to expense. The Concur system features include:

- Single Sign-on access via ConnectCarolina or the Travel Office website.
- University policies are built directly into the system.
- Mobile access with the ability to create, submit, and approve requests and reports via the Concur mobile app.
- And more!

How to Use this Guidebook

This guidebook provides step-by-step instructions on how to perform various functions in the Concur system with detailed guidance. If you have questions about the content of this guide or need additional assistance, please contact:

Concur Support Desk: <https://go.unc.edu/concursupport>

Webpage: finance.unc.edu/services/travel/

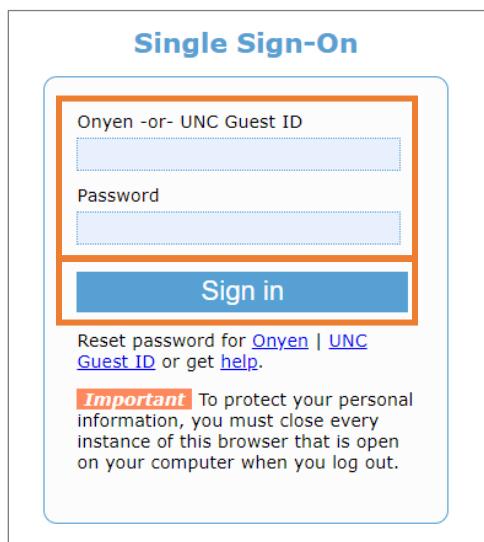
2. Getting Started with Concur

Signing into Concur

Users can log in to Concur via the Travel Services webpage, after signing into ConnectCarolina, or directly via concursolutions.com.

Via the Travel Services Webpage

1. Go to <https://finance.unc.edu/services/travel/concur> by entering it into your internet browsers address bar.
2. Click the **Concur Travel System** button.
Result: You will be prompted to complete Single Sign-on.
3. Enter your **ONYEN** and **Password**.
4. Click the **Sign in** button.



The image shows a "Single Sign-On" login form. It has two input fields: "Onyen -or- UNC Guest ID" and "Password", both of which are highlighted with an orange border. Below these fields is a large blue "Sign in" button. At the bottom left, there is a link to "Reset password for [Onyen](#) | [UNC Guest ID](#) or get [help](#)". At the bottom right, there is an "Important" note: "To protect your personal information, you must close every instance of this browser that is open on your computer when you log out."

Result: You will be prompted to complete Duo Authentication.

5. Complete the Duo Authentication.

Result: You will be logged into the Concur system.

Via ConnectCarolina

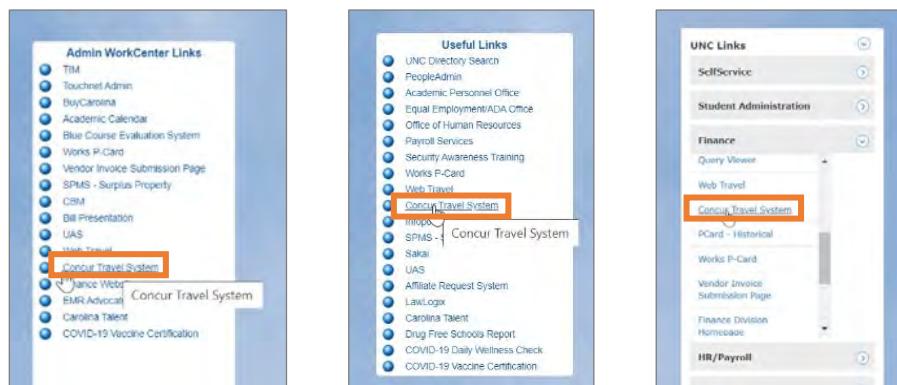
1. Go to <https://connectcarolina.unc.edu/> by entering it into your internet browsers address bar.
2. Click the **Log In** button.



3. Complete the Single Sign-On (SSO) by entering your ONYEN username, password, and Duo Authentication.

A screenshot of the "Single Sign-On" login page. It features a blue header with the text "Single Sign-On". Below the header is a large orange-bordered input field containing two text boxes: "Onyen -or- UNC Guest ID" and "Password". At the bottom of this field is a blue "Sign in" button. Below the input field is a link to "Reset password for Onyen | UNC Guest ID or get help.". A red box highlights the "Sign in" button. To the right of the input field is a red box containing an "Important" note: "To protect your personal information, you must close every instance of this browser that is open on your computer when you log out." The entire form is set against a light gray background.

4. Click the **Concur** link from the Admin WorkCenter, Self Service, or Faculty Portal.



Result: Your SSO credentials will automatically be verified with your Concur Username and you will be logged into the Concur system.

Via Concur Directly

You can also log in to your Concur account by directly accessing their site at concursolutions.com. After navigating to concursolutions.com, follow these steps to login:

1. Enter your user name as your ONYEN@unc.edu.

Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.

2. Click the **Next** button.

Sign In

Username, verified email address, or SSO code

Next

Remember me
Forgot username
Need help signing in

Learn about SAP Concur for your business

3. Click the **Sign in with UNC Single Sign-On** button.

Sign In

Sign in with:

UNC Single Sign-On

SAP Concur Password

Learn about SAP Concur for your business

Result: You will be taken to the UNCCH Single Sign-On page.

4. Enter your **ONYEN** and **Password**.

5. Click the **Sign in** button.

The screenshot shows a "Single Sign-On" page. At the top, it says "Single Sign-On". Below that is a form with two input fields: "Onyen -or- UNC Guest ID" and "Password", both of which are highlighted with an orange border. Below the fields is a blue "Sign in" button, which is also highlighted with an orange border. At the bottom left, there is a link to "Reset password for [Onyen](#) | [UNC Guest ID](#) or get [help](#)". To the right of the link is an "Important" note: "To protect your personal information, you must close every instance of this browser that is open on your computer when you log out."

Result: You will be prompted to complete Duo Authentication.

6. Complete the Duo Authentication.
7. **Result:** You will arrive at the Concur homepage.

Note: Once signed into Concur, if you bookmark the page the link will appear as <https://concursolutions.com>. When using the bookmark in the future, you will be brought to the main Sign In page for Concur.

Exploring the Concur Homepage

The Concur home page provides direct access to Concur Expense, Requests, Travel, and Approvals. To return to the Concur home page from any other page, click the SAP Concur logo on the top left of the screen.

Section	Description
Quick Task Bar	This section provides Quick Task (links) so you can: <ul style="list-style-type: none">Start a new report or requestOpen reports and requestsManage available expensesManage approvals
My Tasks	This section shows: <ul style="list-style-type: none">Required Approvals – Shows listing of Travel Requests and Expense Reports that require your approval.Available Expenses – Shows listing of expenses and receipts received from T&E Cards, Mobile App, and Direct Airfare billing that have not been assigned to an Expense Report.Open Reports - Shows listing of Expense Reports that are open and have not been submitted.
Company Notes	Content is provided by UNC-Chapel Hill Travel Services.

The screenshot shows the SAP Concur homepage. At the top right, there is a 'Quick Task' bar with five items: '+ New', '00 Required Approvals', '01 Authorization Requests', '00 Available Expenses', and '02 Open Reports'. An orange arrow points to this bar with the text 'Shows total number of tasks for each tile.' Below the bar, the 'My Tasks' section is highlighted with an orange box. It contains three tiles: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (02). Arrows point from the corresponding numbers in the 'My Tasks' tiles to the respective numbers in the 'Quick Task' bar. The 'Required Approvals' tile shows a message: 'Great! You currently have no approvals.' The 'Available Expenses' tile shows a message: 'You currently have no available expenses.' The 'Open Reports' tile lists two entries: '01/12 MINT Conference \$170.76' and '12/19 MINT Conference \$103.50 Returned'. On the left side of the page, there are sections for 'Trip Search' and 'Mixed Flight/Train Search'. At the bottom left, there is a 'My Trips (0)' section with a note: 'You currently have no upcoming trips.'

Updating Your Profile

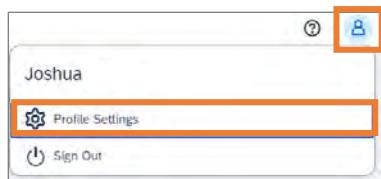
You can use the Profile Options page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, etc.) complete your profile after logging into Concur for the first time and update it whenever your information changes.

Options	Description
Your Information	Select personal information, work address, home address, contact information, and verify email address.
Request Settings	Select request information, add or remove delegates, enter email preferences, select approvers, and add or remove attendees.
Expense Settings	Select expense information, add or remove delegates, enter email preferences, select approvers, set up personal car, and add or remove attendees.
Travel Settings	Select Travel Preferences to select travel preferences, Accessibility needs, TSA, and passport information.
Other Settings	Provides settings such as E-Receipts Activation and Concur Mobile Registration that you can set or update.

Accessing Your Profile Information

Follow these steps to access your profile information:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



Result: You will be directed to the Profile Options page.

3. Click the **Personal Information** link.

The screenshot shows the SAP Concur Profile interface. At the top, there are tabs for Profile, Personal Information (which is highlighted with a red box), Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. Below the tabs, there are several sections: Your Information (with links to Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, and Credit Cards), Travel Settings (with links to Travel Preferences, International Travel, Frequent-Traveller Programs, Assistants/Arrangers), Request Settings (with links to Request Information, Request Delegates, Request Preferences, Request Approvers, and Favorite Attendees), Expense Settings (with links to Expense Information, Bank Information, Expense Delegates, Expense Preferences, Expense Approvers, Personal Car, and Favorite Attendees), and Other Settings (with links to E-Receipt Activation, System Settings, Concur Connect, Change Password, Travel Vacation Reassignment, and Concur Mobile Registration). A sidebar on the left has a question mark icon.

Result: The My Profile – Personal Information page appears.

4. For each section, add the appropriate information, including the required fields that have been noted in red.

The screenshot shows the 'My Profile - Personal Information' page. At the top, it says 'Jump To: Personal Information' with a 'Choose' button. Below that is a note: 'Please Note: To Ensure your Travel Information is entered into each Reservation Successfully, the Profile should have:' followed by a list of requirements. Then there's an 'Important Note' box with a warning about name and airport security. The form includes fields for Title, First Name (Required), Middle Name (Required), Preferred Name, Last Name (Required), and Suffix. There's also a checkbox for 'No Middle Name'. Below this is a 'Company Information' section with fields for Employee ID and Cost Center, and a 'Go to top' link.

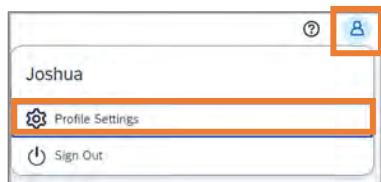
Important: In the TSA Secure Flight section, you must confirm the gender designated on your government issued photo id.

5. Click the **Save** button.

Verifying Your Email Address

When you setup your account, you should verify your email address. This will allow you to send and receive email receipts to your Available Receipt library (or to your Available Expenses if you have enabled Expenselt). Follow these steps to verify an email address:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. From the menu on the left, click the **Email Addresses** link in the Your Information section.

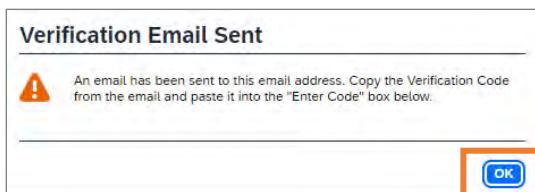


- Click the **Verify** link in the verify column of the email address you wish to verify.

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 jham001@email.unc.edu	Not Verified	Verify	Yes	

Result: An alert message will appear.

- Click the **OK** button.



Result: A verification code will be sent to the selected email address from Concur.

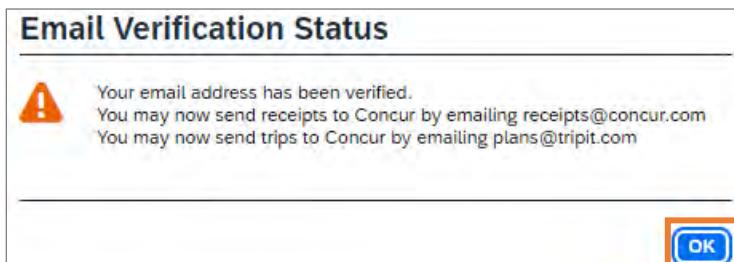
- Using the code from the email you received, **enter the code** in the Enter Code field, next to the appropriate email address.

Email Address	Verification Status	Verify	Contact?	Actions
ail.unc.edu	Check email for code	OK	Resend Cancel	Yes

- Click the **OK** button.

Result: A pop-up message will appear.

- Click the **OK** button, on the pop-up message.



Result: Verification Status will change to Verified with a green check icon.

Email Address	Verification Status	Verify
joshua@tarheel.unc.edu	 Verified	Disable Verification

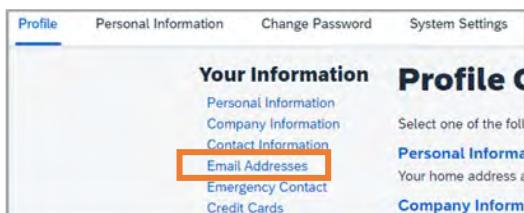
Adding a Personal Email Address

You also have the option to add additional email addresses, including personal email addresses, to receive reminders and notifications. Follow these steps to add a personal email address:

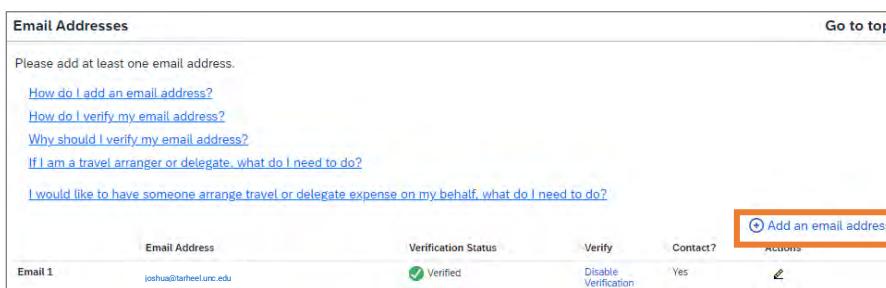
1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. From the menu on the left, click the **Email Addresses** link under the Your Information section.



4. Click the **Add an email address** link.



Please add at least one email address.

[How do I add an email address?](#)
[How do I verify my email address?](#)
[Why should I verify my email address?](#)
[If I am a travel arranger or delegate, what do I need to do?](#)
[I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?](#)

Email Address	Verification Status	Verify	Contact?	Actions
Email 1 joshua@tarheel.unc.edu	 Verified	Disable Verification	Yes	

5. Enter the email address you want to add.

Note: Select the Yes radio button if you would like this email address to receive notifications.

6. Click the **OK** link.

Email Addresses						Go to top	
Please add at least one email address.							
How do I add an email address? How do I verify my email address? Why should I verify my email address? If I am a travel arranger or delegate, what do I need to do? I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?							
						+ Add an email address	
Email Address	Verification Status	Verify	Contact?	Actions			
Email 1 joshua@tarheel.unc.edu	Verified	Disable Verification	Yes				
Enter email address <input type="text"/>			Contact for Travel Notifications? <input type="radio"/> Yes <input checked="" type="radio"/> No		OK	Cancel	

Result: The new email address is added to the listing of email addresses.

Email Addresses						Go to top	
Please add at least one email address.							
How do I add an email address? How do I verify my email address? Why should I verify my email address? If I am a travel arranger or delegate, what do I need to do? I would like to have someone arrange travel or delegate expense on my behalf, what do I need to do?							
						+ Add an email address	
Email Address	Verification Status	Verify	Contact?	Actions			
Email 1 joshua@tarheel.unc.edu	Verified	Disable Verification	Yes				
Email 2 238th@qoheels.unc.edu	Not Verified	Verify	No				

Important: All email addresses should be verified. Follow the steps noted in the [Verifying Your Email Address](#) section to verify additional email addresses.

Setting Up Reminders and Notifications

Concur will automatically send email notifications and reminders regarding Travel Requests, Trips, Expense Reports, T&E Card Transactions, and Airfare-Direct Billing Transactions. Reminder emails will be sent from emailreminderservice@concursolutions.com and notification emails will be sent from autonotification@concursolutions.com. To ensure that these messages are not sent to a spam folder, add them as a contact or as a safe sender to your email account.

Reminder email settings cannot be turned off or changed. However, some notification settings may be managed in the Preferences section of your Profile. A list of common notifications/reminders are included below:

Email Reminders

- Outstanding Travel Request Approvals Reminders
- T&E Card Transaction Reminders
- Expense Report Submission Reminders
- Outstanding Expense Report Approvals Reminders

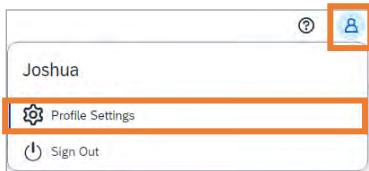
Email Notifications

- Travel Request Pending Approval Notifications
- Request Recall Notifications
- Request Status Change Notifications
- New Company Card Transactions Notifications
- Expense Report Pending Approval Notifications
- Expense Report Recall Notifications
- Expense Report Status Change Notifications

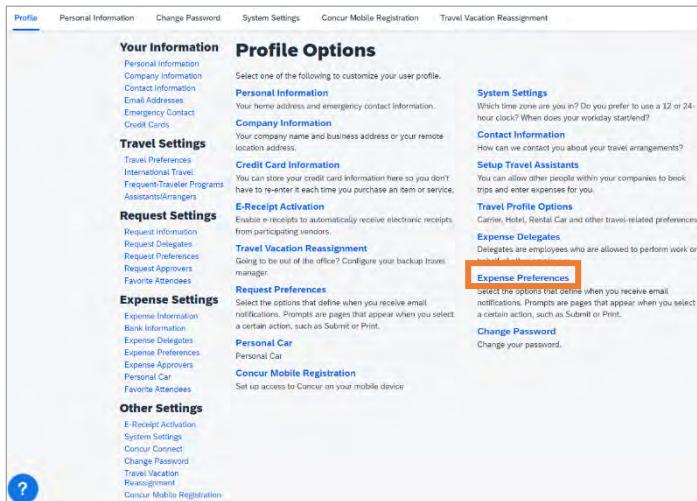
Managing Expense Notifications

Follow these steps to define when you receive an email notification from Concur Expense:

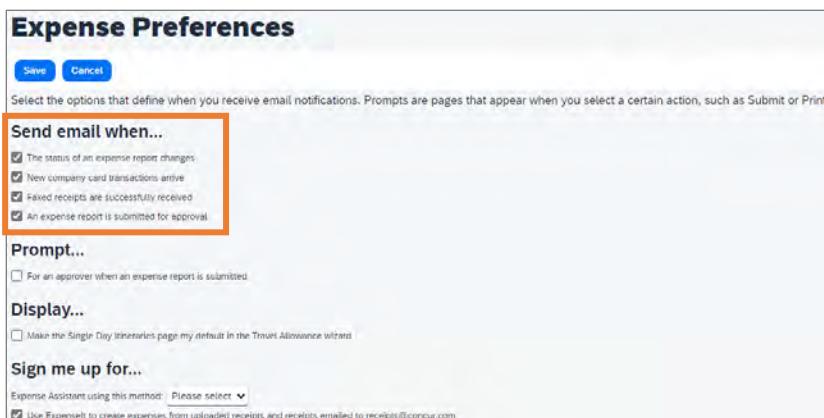
1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. Click the **Expense Preferences** link.



4. Mark the checkbox for when you want an email notification.



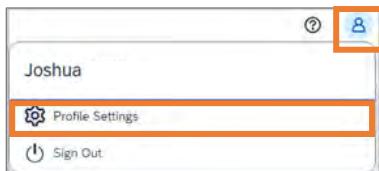
Important: It is against T&E Card Policy to disable the "New company card transactions arrive" notification.

5. Click the **Save** button.

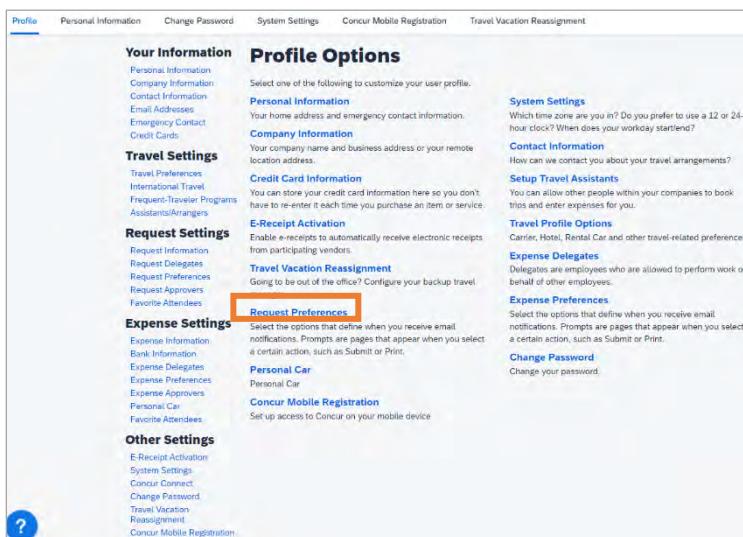
Managing Request Notifications

Follow these steps to define when you receive an email notification from Concur Request:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. Click the **Request Preferences** link.



4. Mark the checkbox of when you want an email notification.

A screenshot of the Concur Request Preferences dialog box. It has "Save" and "Cancel" buttons at the top. A descriptive text below says: "Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print." There are two sections: "Send email when..." and "Prompt...". The "Send email when..." section contains two checked checkboxes: "The status of a request changes" and "A request is submitted for approval". The "Prompt..." section contains one unchecked checkbox: "For an approver when a request is submitted".

5. Click the **Save** button.

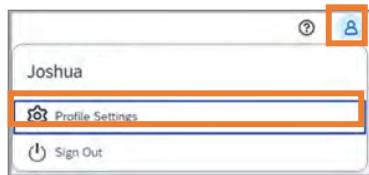
Using Expense Assistant

Expense Assistant adds all your incoming UNC-Chapel Hill Travel & Expense (T&E) Card transactions to an open expense report. An open report can be a user-created expense report or an expense report that is auto-created by Expense Assistant. Expense Assistant will continue to add all your new incoming transactions that have a post date that matches the calendar month of the expense report. Once you enable Expense Assistant, you can access your automatically created reports on the Expense page.

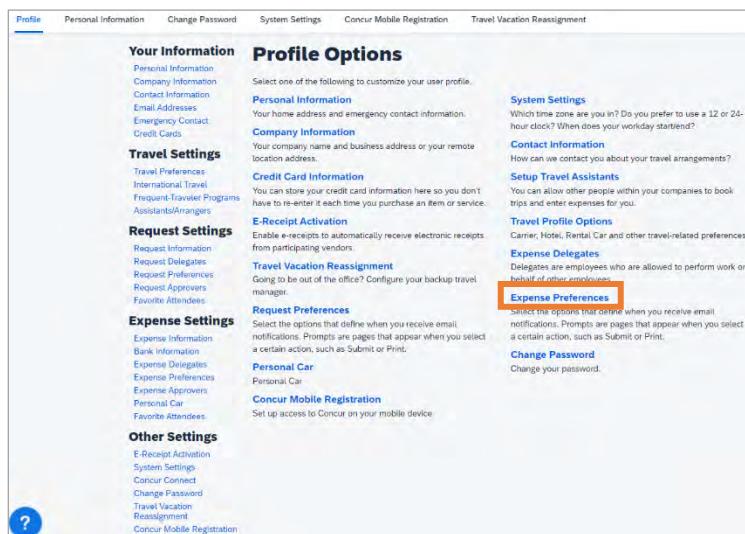
Enabling Expense Assistant

Follow these steps to enable Expense Assistant:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. Click the **Expense Preferences** link.



4. Select **By Month** from the Sign me up for drop down menu.

Expense Preferences

[Save](#) [Cancel](#)

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

The status of an expense report changes.
 New company card transaction arrive
 Faxed receipts are successfully received
 An expense report is submitted for approval.

Prompt...

For an approver when an expense report is submitted

Display...

Make the Single Day Itineraries page my default in the Travel Allowance wizard

Sign me up for...

Expense Assistant using this method: [Please select](#) Use ExpressIt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com

5. Click the **Save** button.

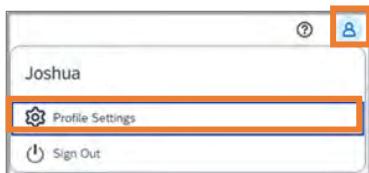
Result: Your Expense Preferences are saved, and Expense Assistant will begin adding transactions to a monthly expense report. On the Manage Expenses screen, you can view your newly created reports. Transactions are added to your reports based on their transaction post date.

Note: If a traveler enables Expense Assistant, they must manually link the Expense Report to its corresponding Travel Request if one exists.

Disabling Expense Assistant

To stop all incoming transactions from being placed on an unsubmitted report, you can disable Expense Assistant. Follow these steps to disable Expense Assistant:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. Click the **Expense Preferences** link.

The screenshot shows the 'Profile Options' section of the Concur interface. It includes sections for 'Your Information', 'Profile Options', 'Travel Settings', 'Request Settings', 'Expense Settings', 'Other Settings', and 'System Settings'. Each section contains specific configuration options and descriptions. A question mark icon is located in the bottom-left corner of the page.

4. Select **None** from the "Sign me up for..." dropdown menu.

The screenshot shows the 'Expense Preferences' dialog box. It has tabs for 'Send email when...', 'Prompt...', 'Display...', and 'Sign me up for...'. Under 'Sign me up for...', there is a dropdown menu labeled 'Please select' with 'None' highlighted, and a checkbox for 'Use ExpressIt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com'.

5. Click the **Save** button.

Result: Your Expense Preferences are saved, and Expense Assistant will not add transactions to an expense report.

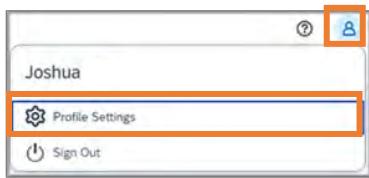
Enabling Expenselt

If the user has verified their email address with the Concur system, they have the ability to email receipts to receipts@concur.com. When receipts are emailed to the designated address and the User has enabled Expenselt, emailed receipts will automatically be turned into Expenses and listed in the User's Available Expenses section. Receipt information will be read and captured in the same way as when using the Concur Mobile App. This includes itemization of some receipts such as hotel folios.

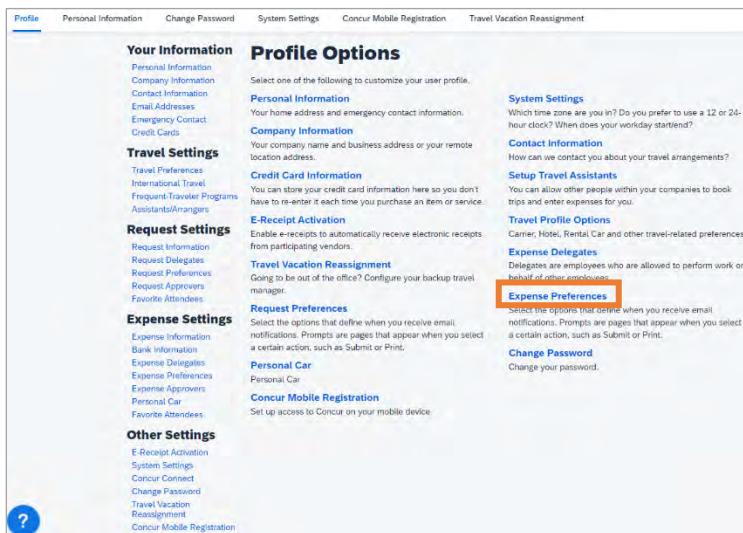
Enabling Expenselt

Follow these steps to enable Expenselt:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



3. Click the **Expense Preferences** link.



4. Select the checkbox for "Use Expenselt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com."

Expense Preferences

[Save](#) [Cancel](#)

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

The status of a cash advance changes
 A cash advance is submitted for approval
 The status of an expense report changes
 New company card transactions arrive
 Faxed receipts are successfully received
 An expense report is submitted for approval
 A card feed import completes

Prompt...

For an approver when an expense report is submitted

Display...

Make the Single Day Itineraries page my default in the Travel Allowance wizard

Sign me up for...

Expense Assistant using this method: By Month ▾

Use Expenselt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com

5. Click the **Save** button.

Result: Your Expense Preferences are saved, and Expenselt will automatically create expenses for all emailed and uploaded receipts.

3. Using Delegates & Travel Assistants

The Concur system allows you to create Delegates and Travel Assistants who can act on your behalf. A Delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating or approving requests and expense reports. You can create the following types of delegates:

Approval Delegate - An Approval Delegate can assist in reviewing or approving Requests and Expense Reports on your behalf. Approval Delegates can use the Preview feature to send an email notification to the user when a request or report is ready for their approval.

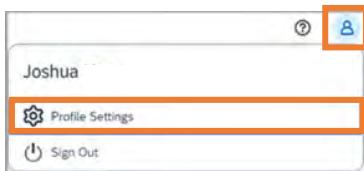
Personal Delegate - A personal delegate can assist in preparing Requests and Expense Reports on your behalf. Additional permissions may include the ability to view receipt images and/or receive copies of emails. However, Personal Delegates cannot submit reports on your behalf. Personal Delegates can use the Notify feature to send an email notification to the user when a Travel Request or Expense Report is ready to be submitted; or if given permission, can submit a Travel Request on behalf of the traveler.

Delegates may be managed and assigned through the Request Delegates link on the Profile Options page or by following the steps below to access the Expense Delegates link. Regardless of the navigation path chosen, Delegates will have the same access to both systems.

Creating a Delegate

Follow the steps below to create a delegate:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



Result: You will be directed to the Profile Options page.

3. Click the **Expense Delegates** link.

The screenshot shows the SAP Concur Profile Options page. The 'Expense Delegates' section is highlighted with an orange box. The page includes sections for Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards, Travel Preferences, International Travel, Frequent-Traveller Programs, Assistants/Arrangers, Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, Expense Information, Bank Information, Expense Delegates, Expense Preferences, Expense Approvers, Personal Car, Favorite Attendees, Other Settings, E-Receipt Activation, System Settings, Concur Connect, Change Password, Travel Vacation, Reassignment, and Concur Mobile Registration.

4. Click the **Add** button.

The screenshot shows the SAP Concur Expense Delegates page. The 'Add' button is highlighted with an orange box. The page includes sections for Delegates and Delegate For, a note about temporary approvers, and a table for assigning permissions. The table columns are: Name, Can Prepare, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. A message at the bottom states 'No records found.'

5. Begin entering the name of the employee you want to assign as a delegate.

The screenshot shows the SAP Concur Expense Delegates page. A search bar is highlighted with an orange box. The page includes sections for Delegates and Delegate For, a note about temporary approvers, and a table for assigning permissions. The table columns are: Name, Can Prepare, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. A message at the bottom states 'No records found.'

6. Click on the employee you wish to add as a delegate and then click **Add**.

Delegates are employees who are allowed to perform work on behalf of other employees.

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

Cortnev.Test@Tarheel.unc.edu-Cortnev Test

Add Cancel

7. Select the task(s) you want to delegate or perform on your behalf and what notifications they should receive.

<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"/> Test, Cortney Cortney.Test@Tarheel.unc.ed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Personal Delegate Options:

- **Can Prepare** – This allows the delegate to prepare requests or expenses on your behalf.
- **Can Submit Requests** – This allows the delegate to submit requests on your behalf.
- **Can View Receipts** – This allows the delegate to view receipts that are uploaded to your account in the Concur system.
- **Receives Emails** – This allows the delegate to receive the same email notifications that you receive based on your email notification settings.

Approval Delegate Options:

- **Can Approve** – This allows the delegate to review and approve requests or expenses on your behalf.
- **Can Approve Temporary** – This allows the delegate to review and approve requests or expenses on your behalf only during the designated time frame.
- **Can Preview for Approver** – This allows the delegate to review a request or report and then notify the Approver once it is ready for their approval.
- **Receives Approval Emails** – This allows the delegate to receive the same email notifications that a user who is an approver receives.

<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"/> Test Cortney Cortney.Test@tarheel.unc.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/> 	<input type="checkbox"/> 	<input checked="" type="checkbox"/>				

8. Click the **Save** button.

Expense Delegates

Delegate To 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"/> Test Cortney Cortney.Test@tarheel.unc.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/> 	<input type="checkbox"/> 	<input checked="" type="checkbox"/>				

Deleting a Delegate

Follow these steps to delete a delegate:

1. Follow steps 1 to 3, from the section [Creating a Delegate](#).
2. Check the box beside the individual you want to remove as a delegate.
3. Click the **Delete** button.

The screenshot shows the 'Expense Delegates' page. At the top, there are two tabs: 'Delegates' (selected) and 'Delegate For'. Below the tabs are three buttons: 'Add' (blue), 'Save' (blue), and 'Delete' (blue, highlighted with a red box). A note below the buttons states: '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.' A sub-note says: 'Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' The main table lists delegates with columns: Name, Can Prepare, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The first row shows a checked checkbox next to 'Name' for 'Test Cortney' (Cortney.Test@tarheel.unc.edu). The 'Can Approve Temporary' column contains a dropdown menu with options: 'None', 'Temporary', and 'Both' (the latter is selected).

Result: A pop-up message will appear verifying that you want to delete the selected delegate.

4. Click the **OK** button on the pop-up message.

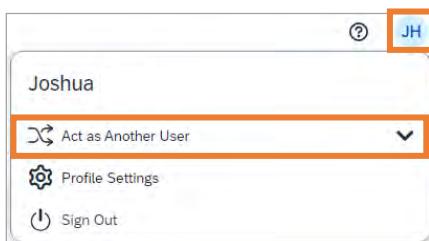
Result: The system will delete the delegate you selected.

Acting as a Delegate

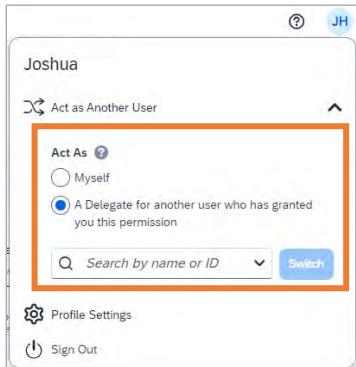
If you have been assigned to work as a delegate, your delegators will define which task(s) you can complete, such as preparing reports or approving on their behalf.

Follow these steps to act as a delegate:

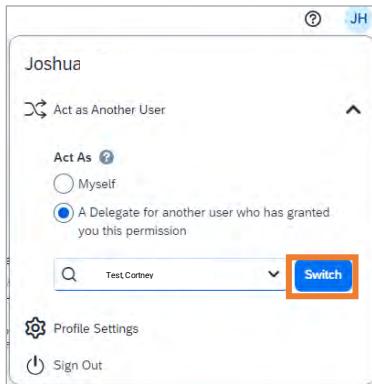
1. Click the **Profile** icon.
2. Click the **Acting as other user dropdown arrow**.



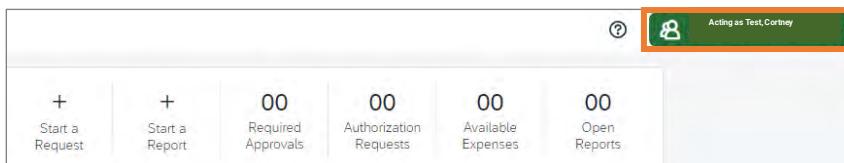
3. Select *A delegate for another user who has granted you this permission* in the **Act As options**. Begin entering the name of the employee you want to act on behalf of. Click on the employee you wish to act on behalf of.



4. Click the **Switch** button.



Result: The Profile menu will display “Acting as” and shows the name you selected. You are now officially working on behalf of that person.

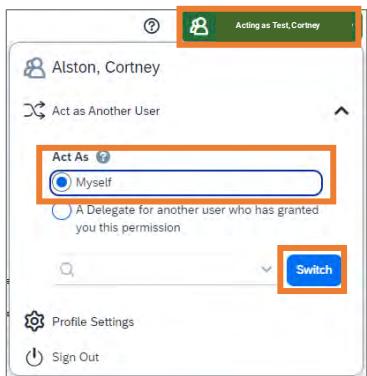


Note: To select a different user, follow the same steps but select a different name.

Stopping Work as a Delegate

Follow these steps to stop working as a delegate:

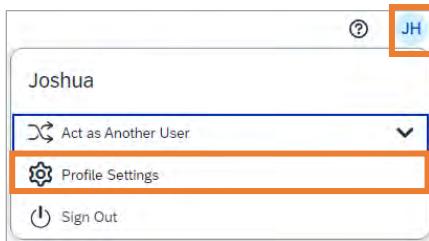
1. Click the **Acting as** link.
2. Select *Myself* in the **Act As options**.
3. Click **Switch**.



Creating a Travel Assistant

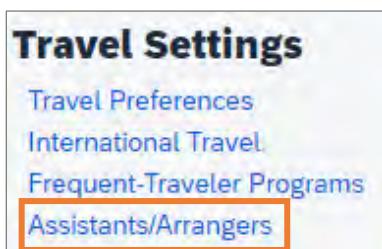
A Traveler can assign a Travel Assistant (Arranger) to manage their travel activities including booking, canceling, and changing trip information. A Traveler can choose an arranger in the Profile section. Follow these steps to create a Travel Assistant:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.

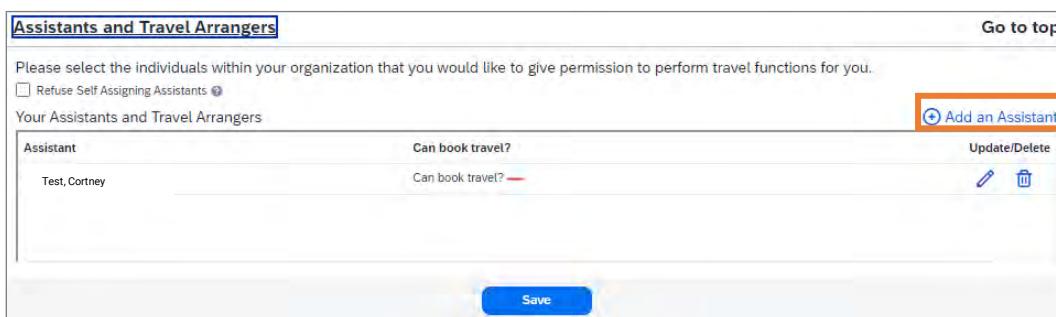


Result: You will be directed to the Profile Options page.

3. In the Travel Settings section, click the **Assistants/Arrangers** link.



4. Click the **Add an Assistant** link.



Result: The Add an Assistant pop-up window will appear.

5. In the Assistant field, enter the name of the individual(s) you would like to be your Travel Assistant.

6. Mark the checkbox for **Can book travel for me**.
7. Mark the checkbox **Is my primary assistant for travel**, if applicable.
8. Click the **Save** button.

Add an Assistant

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

Assistant
<input type="checkbox"/> Can book travel for me
<input type="checkbox"/> Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary contact for travel.

? **Save** **Cancel**

Result: The selected individual will be listed as a Travel Assistant/Arranger.

9. Click the **Save** button.

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..			
<input type="checkbox"/> Refuse Self Assigning Assistants <small>(?)</small>			(+) Add an Assistant
Your Assistants and Travel Arrangers			
Assistant Changes Saved			
Assistant	Can book travel?	Update/Delete	
Test, Cortney	Can book travel? <input checked="" type="checkbox"/>	 	
Save			

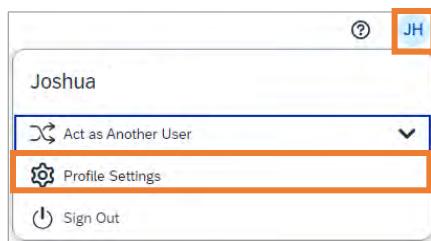
Deleting a Travel Assistant

A Travel Assistant is a user who can book travel on behalf of another user. Travel Assistants, also known as Arrangers, can be assigned, and/or removed at any time.

If you are the Traveler

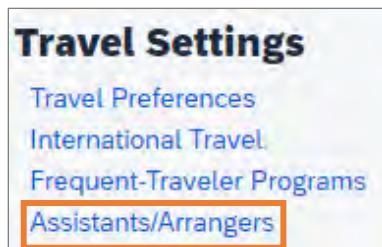
Follow these steps to delete a Travel Assistant or Arranger from your profile:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



Result: You will be directed to the Profile Options page.

3. In the Travel settings section, click the **Assistants/Arrangers** link.

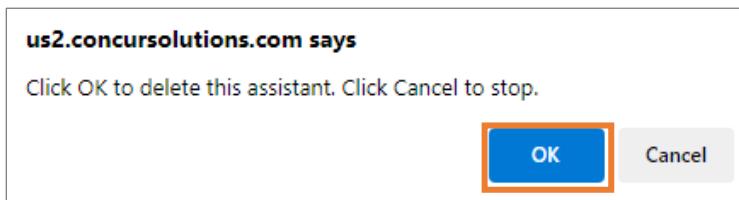


4. Click the **Trashcan** icon beside the individual(s) you want to delete.

A screenshot of the 'Assistants and Travel Arrangers' page. It has a header with 'Assistants and Travel Arrangers' and 'Go to top'. Below is a note about selecting individuals for travel functions. A checkbox for 'Refuse Self Assigning Assistants' is present. A table lists 'Your Assistants and Travel Arrangers' with columns for 'Assistant', 'Can book travel?' (with a checked checkbox), and 'Update/Delete' (with a trashcan icon). A 'Save' button is at the bottom.

Result: A pop-up confirmation message will appear.

5. Click the **OK** button.



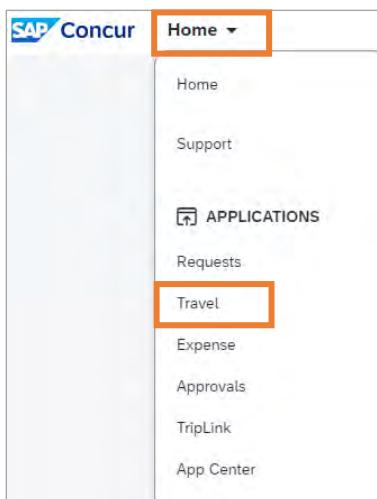
Result: The Travel Assistant is deleted from the listing.

6. Click the **Save** button.

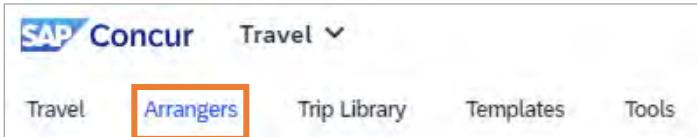
If you are a Travel Assistant/Arranger

Follow these steps to delete yourself as being a Travel Assistant or Arranger for a Traveler:

1. Click the **Home** drop-down and then select **Travel** from the menu.



2. Click the **Arrangers** tab at the top of the screen.

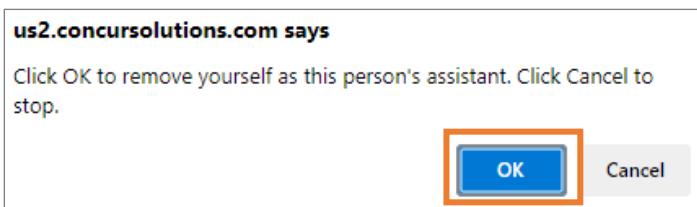


3. Click the **I'm Assisting** tab.
4. Click the **Trashcan** icon beside the Traveler you want to delete yourself from as a Travel Assistant.



Result: A pop-up message will appear.

5. Click the **OK** button.



Result: You will no longer have the ability to book travel for the selected Traveler and their name is removed from the listing.

Acting as a Travel Assistant

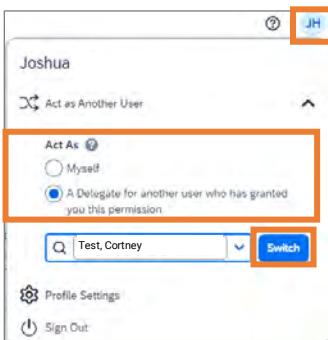
A Travel Assistant (Arranger) can manage travel activities (book, cancel, change trips, etc.) for travelers. Individuals who have been designated as a Travel Assistant can:

- Book flight, rental car, hotel, etc.
- View upcoming trips.
- Manage trips actions such as changing or cancelling a trip for a traveler.
- View/Filter travelers by name or date of traveler.
- View trip segment information without having to access the full itinerary.
- Access the airline's check-in webpage to check the Traveler in for a flight.
- Access TSA wait time information.
- Add another travel arranger for a traveler.
- Discontinue their own arranger association with a traveler.

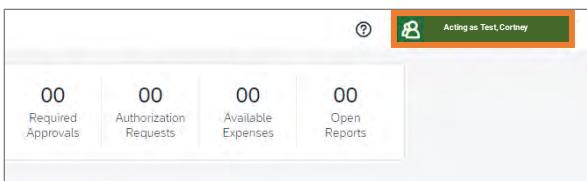
If you have been designated as a Travel Assistant or Travel Arrangers, follow these steps to manage and administer travel for another user.

1. Click the **Profile** icon.
2. Click the dropdown for **Acting as other user**, under **Act As** select *A Delegate for another user who has granted you this permission*. Then begin entering the name of the employee you want to act on their behalf.
3. Click on the employee you wish to act on their behalf.

4. Click the **Switch** button.

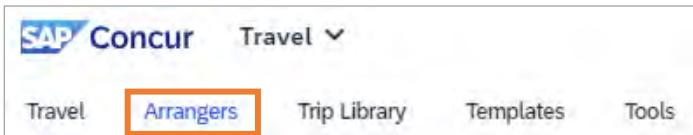


Result: The Profile menu will display “Acting as” and shows the name you selected. You are now officially working on behalf of that person.



Note: After signing in to Act as a Delegate you will need to access the Travel Arranger View page to manage travel for other users.

5. Click the **Home drop-down** and then select **Travel** from the menu.
6. Click the **Arrangers** tab.

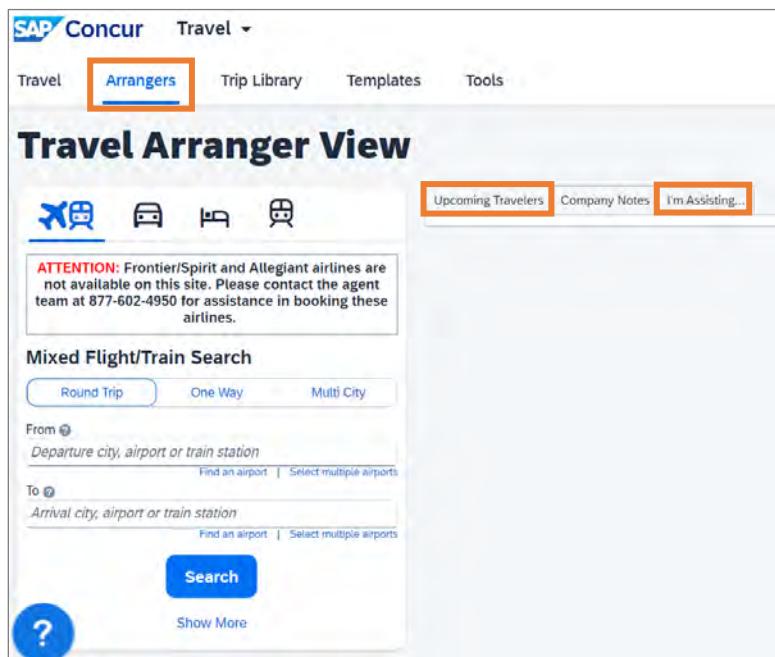


Result: You will be brought to the Travel Arrangers View page and can begin managing travel on behalf of another user.

Exploring the Travel Arrangers View Page

The Travelers Arranger View page is where the arranger can perform multiple functions on the traveler's behalf.

Section	Description
Upcoming Travelers tab	Use this tab to: <ul style="list-style-type: none">Search for Travelers based on names or travel datesView Travelers contact phone numberAccess Trip Actions menu to view itineraries, cancel trips, etc.Access Travel Preferences link to view travel preferences
I'm Assisting tab	Use this tab to: <ul style="list-style-type: none">Access a traveler's profileDiscontinue (delete) your travel arranger designation

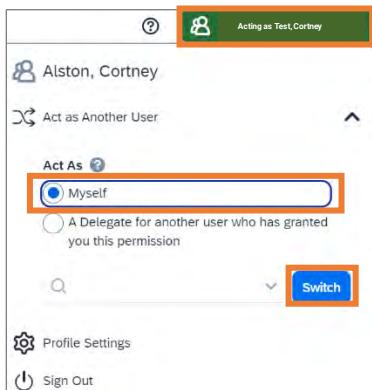


Note: Traveler Assistants/Arrangers can set the Travel Arranger View page as the homepage when logging into the Concur System. This can be done by following the menu path of Profile Settings > System Settings > Other Preferences. For the Home Page option, select Traveler Arranger View.

Stopping Working as a Travel Assistant

Follow these steps to stop working as a Travel Assistant:

1. Click the **Acting as** link.
2. Select **Act As Myself**.
3. Click **Switch**.



4. Understanding Approval Workflows

When a Travel Request or Expense Report is submitted it will go through an approval workflow. This process ensures that prior to a Travel Request or Expense Report being processed it has been reviewed and approved by designated department approvers or Business Officers. The default approval workflow in Concur is assigned based on the Department approval workflow in ConnectCarolina. Changes made in ConnectCarolina will be imported into Concur on a nightly basis. These changes will not update the workflow of requests/reports which have already been submitted but will affect the workflow of new submissions or re-submissions.

Adding a Default Approver to Your Approval Workflow

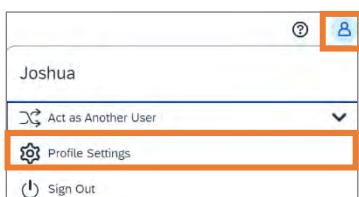
Default approvers can be added to a user's approval workflows via their user profile.

Default approvers can be added:

- only in Request,
- only in Expense,
- the same in both systems,
- or be different between the two systems, if necessary.

Default approvers will always be the first to approve in the Workflow before the request/report routes to the approvers of the assigned chartfield string(s). Follow these steps to add a default approver to the user's profile:

1. Click the **Profile** icon.
2. Click the **Profile Settings** link.



Result: You will be directed to the Profile Options page.

Adding Default Request Approvers

3. Click the **Request Approvers** link.

The screenshot shows the 'Profile' tab selected in the top navigation bar. The main content area is titled 'Profile Options'. On the left, there's a sidebar with sections like 'Your Information', 'Travel Settings', 'Request Settings' (with 'Request Approvers' highlighted by a red box), and 'Expense Settings'. The right side contains various configuration options with brief descriptions.

4. Search for the employee you want to add as a default approver.
5. Click on the user you want to add.
6. Click the **Save** button.

The screenshot shows a modal dialog box titled 'Request Approvers'. It has two buttons at the top: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons is a descriptive text: 'Default approver for your Requests'. At the bottom is a search input field with the placeholder 'Search by employee name, email address, employee id or login id' (also highlighted with a red box).

Adding Default Expense Approvers

7. Click the **Expense Approvers** link.

The screenshot shows the 'Profile' tab selected in the top navigation bar. The left sidebar contains sections for 'Your Information', 'Travel Settings', 'Request Settings', and 'Expense Settings'. Under 'Expense Settings', the 'Expense Approvers' link is highlighted with a red box. The main content area is titled 'Profile Options' and contains several configuration sections: Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards; Travel Preferences, International Travel, Frequent-Traveller Programs, Assistants/Arrangers; Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees; Expense Information, Bank Information, Expense Delegates; and Personal Car. A 'Concur Mobile Registration' link is also present.

8. Search for the employee you want to add as a default approver.
9. Click on the user you want to add.
10. Click the **Save** button.

The screenshot shows a modal dialog box titled 'Expense Approvers'. It contains two buttons at the top: 'Save' (highlighted with a red box) and 'Cancel'. Below the buttons is a message: 'Default approver for your expense reports.' At the bottom is a search input field with the placeholder text 'Search by employee name, email address, employee id or login id' (also highlighted with a red box).

5. Understanding Expense Types

Expense Types/Account Codes are hard-coded in the Concur system and users do not have the ability to change them. When an Expense Type is selected, it automatically pulls the assigned account code. For example, if you choose a trip type of "International" on the Report Header, and then enter an expense line for Airfare (whether out-of-pocket, T&E Card, or directed-billed), the system automatically assigns the account code of 526310 for the International Airfare to the expense. Also, end-users will not see the account codes when reviewing the chartfield string and allocating expenses.

Listing of Expense Types

Expense Type Categories	Subcategories
Lodging Expenses	<ul style="list-style-type: none">• Hotel• Laundry
Transportation	<ul style="list-style-type: none">• Airfare• Airline Fees• Car Rentals• Ferries/Boats• Fuel/Charging Stations• Ground Transportation• Parking• Tolls/Road Charges• Train
Personal Car Mileage	<ul style="list-style-type: none">• Personal Car Mileage
Meals	<ul style="list-style-type: none">• Daily Allowance
Meetings & Amenities	<ul style="list-style-type: none">• Event Space Rental• Event Supplies• Food & Beverage 8 or less• Food & Beverage 9 or more

Office Expenses	<ul style="list-style-type: none"> • Courier/Shipping/Freight • Equipment/Hardware • Postage • Printing/Photocopying/Stationary • Suppliers/Software
Communications	<ul style="list-style-type: none"> • International Mobile Phone • Internet/WiFi Fees
Fees	<ul style="list-style-type: none"> • Currency Exchange Fees • Entry/Exit Fees • International Transaction Fee (T&E Card Only) • Passports/Visa Fees
Other	<ul style="list-style-type: none"> • Booth/Fair Registration • Conference/Seminar Fees • Documentation Only • Immunization/Medical Fees • International Travel Health Insurance • Marketing/Promotional Costs • Miscellaneous • Non-Reimbursable/Personal Expense <p>Note: If a portion or all of a T&E Card charge is personal, the amount will be deducted from any out-of-pocket reimbursement first. If the expense exceeds the total out-of-pocket expenses, it will automatically create a payroll deduction.</p> <ul style="list-style-type: none"> • Professional Subscriptions/Dues • Tip/Gratuities • Tuition/Training Reimbursement

Using the Documentation Only Expense Type

The Documentation Only option from the Expense Type Category should be used only when you need to attach additional backup documentation. Documentation submitted with this expense type will have an expense amount of \$0.00.

6. Creating and Submitting Travel Requests

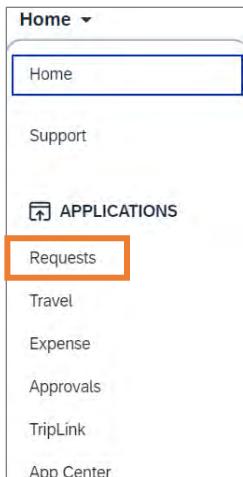
In advance of all overnight University business travel, you must create and submit a travel request prior to making any travel arrangements. Pre-authorization is also required for day travel which includes airfare. You can also manage travel requests and cancel any request.

Delegates may prepare the travel request and then use the Notify feature to alert the traveler when the request is ready to be submitted or you will be able to submit the Travel Request if the Traveler gave you that permission.

Creating a New Travel Request

Follow these steps to create and submit a travel request:

1. From the **Home** drop-down, click **Requests**.



- Click the **Create New Request** button.

The screenshot shows the SAP Concur Requests interface. At the top left is the SAP Concur logo and a 'Requests' dropdown menu. Below it is a 'Manage Requests' link. The main title 'Manage Requests' is displayed prominently. On the right side, there is a 'View' dropdown set to 'Active Requests' and a blue 'Create New Request' button, which is highlighted with a red rectangular box.

- Enter the required (noted by red asterisks) and necessary optional fields.

The screenshot shows the 'Create New Request' dialog box. It contains several input fields: 'Request Name *' (highlighted with a pink box), 'Traveler Type *' (Faculty/Staff), 'Request/Trip Purpose *' (None Selected), 'Request/Trip Start Date *' (MM/DD/YYYY), 'Request/Trip End Date *' (MM/DD/YYYY), 'Request/Trip Type *' (None Selected), 'Destination City *' (dropdown), 'Destination Country' (dropdown), 'Does this trip include personal travel? *' (None Selected), 'Dates of personal travel' (dropdown), 'Is this request/trip federally funded? *' (None Selected), 'Additional Information' (text area with placeholder '0/500'), 'Business Unit *' (UNCC) UNC Chapel Hill (dropdown), 'Dept ID *' (dropdown), 'Fund' (dropdown), and 'Source' (dropdown). At the bottom right are 'Cancel' and 'Create Request' buttons, with 'Create Request' being highlighted with a blue box.

Notes:

- The Traveler Type, Business Unit, and Department ID fields will automatically populate based on your ONYEN and user profile.
- It is considered best practice to include the main destination of the trip and the first day of travel for the request name. For example (Nashville, TN – 08/08/2020).

- Click the **Create Request** button.

Result: A Request ID number will be generated, and you can add any anticipated travel expenses. The Request ID number replaces the CABS Number when using the Direct-Billing option in Concur Travel or booking directly with the University's travel agency.

Adding Personal Travel (if applicable)

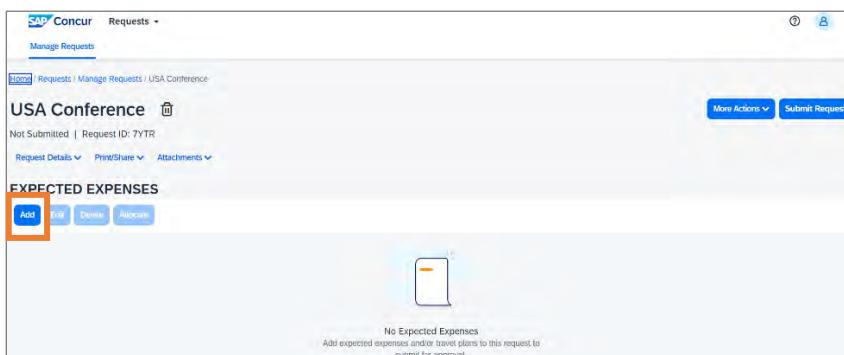
If the travel request will include personal travel it should be documented when creating and submitting the request.

5. Select **Yes**, from the Does this trip include personal travel dropdown.
6. Enter the dates of the personal travel.

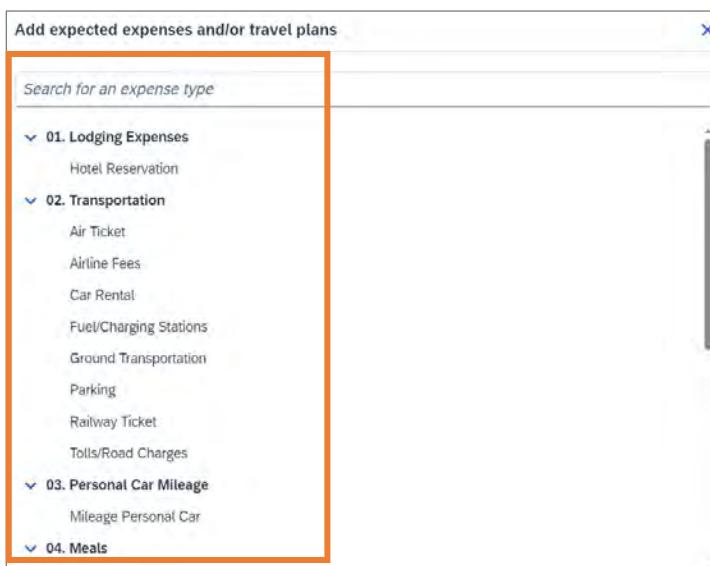
Adding Expenses to a Travel Request

After creating the Travel Request you can add airfare, lodging, or other anticipated expenses. At least one expense must be added to the request before it can be submitted. Follow these steps to add expenses to a travel request:

7. Open the travel request and click the **Add** button.



8. In the pop-up window select or search for the type of expense you need to add.



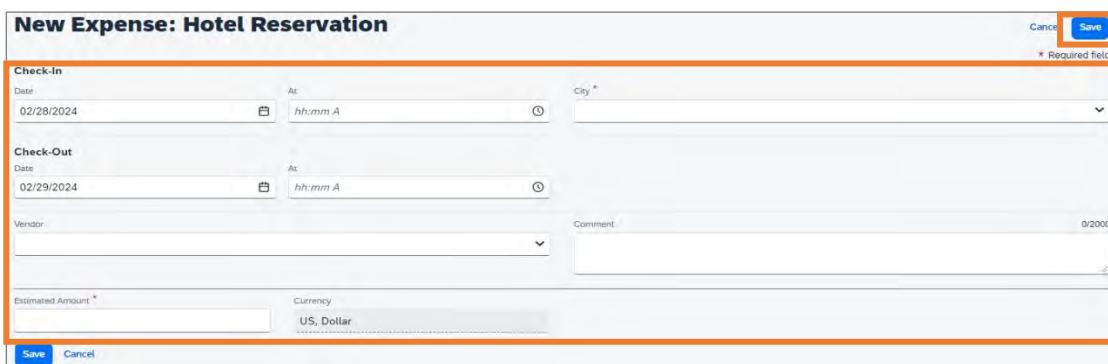
Adding Lodging Expenses to a Travel Request (if applicable)

If you selected Lodging Expenses from step 8, follow these steps to add anticipated lodging expenses:

9. Enter the required (noted by red asterisks) and necessary optional fields.

Note: If Third Party Lodging is selected as the vendor, you must attach the [Non-Hotel Lodging Authorization Request Form](#) for your department's review and approval.

10. Click the **Save** button.



The screenshot shows a web-based form titled "New Expense: Hotel Reservation". The form is divided into sections: "Check-In" and "Check-Out". Under "Check-In", there are fields for Date (02/28/2024), At (hh:mm A), and City (*). Under "Check-Out", there are fields for Date (02/29/2024), At (hh:mm A), and City (*). Below these sections are fields for Vendor, Comment, and Estimated Amount (*). The "Estimated Amount" field has a placeholder "US, Dollar". At the bottom left are "Save" and "Cancel" buttons, with "Save" being highlighted by a red box. At the top right are "Cancel" and "Save" buttons, with "Save" being highlighted by a red box. A note at the top right says "* Required field".

Result: The expense is added to the listing of expected expenses.



<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00

11. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

Adding Air Ticket Transportation to a Travel Request (if applicable)

If you selected Air Ticket Transportation from step 8, follow these steps to add anticipated travel expenses:

12. Select the **Round Trip or One Way** tab.
13. Enter the required (noted by red asterisks) and necessary optional fields.
14. Click the **Save** button.

New Expense: Air Ticket

From * To *

Date * Depart at *

02/28/2024 hh:mm A

Comment 0/200

Return Date * Depart at *

02/29/2024 hh:mm A

Estimated Amount * Currency

US, Dollar

Save Cancel

Result: The expense is added to the list of expected expenses.

Add	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
<input type="checkbox"/>	Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/29/2024	\$286.00	\$286.00
\$491.00					

15. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

Adding Daily Allowance as an Expense to a Travel Request (optional)

If you selected Daily Allowance Meals from step 8. To add the Federal per diem rates, follow the steps below to add "Daily Allowance" to your Travel Request:

16. Enter the required (noted by red asterisks) and necessary optional fields.

Note: The Trip Start Date, Trip End date, and Destination City will automatically be added based on the Request Header. Also, the Estimated Amount will automatically calculate once you click the Save button. The Estimated Amount is pulled in from the current GSA, Department of Defense, or Department of State rates. This amount represents the maximum Daily Allowance which you are eligible to request and will be updated when submitting your Expense Report for reimbursement.

17. Click the **Save** button.

New Expense: Daily Allowance

Request/Trip Start Date * 02/28/2024

Request/Trip End Date 02/29/2024

Destination City Wilmington, North Carolina

Estimated Amount US, Dollar

Comment 0/200

Save Cancel

Result: The Daily Allowance is automatically calculated and added as an Expense. The first and last day of travel are calculated at 75% of the day's total allowance (including incidentals) per Federal policy. The expense is added to the listed of expected expenses.

18. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

The screenshot shows a travel request interface with the following details:

Request Summary: USA Conference \$609.00

Request ID: 7YTR

Request Details: Print/Share, Attachments

EXPECTED EXPENSES:

Add	Edit	Delete	Details	Date	Amount	Requested
<input type="checkbox"/>	Expense type		Details	02/28/2024	\$205.00	\$205.00
<input type="checkbox"/>	Hotel Reservation		Wilmington, North Carolina			
<input type="checkbox"/>	Air Ticket		Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00
<input type="checkbox"/>	Daily Allowance		Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00
Total: \$609.00						

Adding a Travel Cash Advance Request

To request a cash advance, you must include the request when you are creating a travel request. This feature will not automatically be enabled and is typically only available for international travel. Contact the [Concur Support Desk](#) if you believe you need access to Travel Cash Advances. Follow these steps to add a cash advance to a travel request:

1. Follow steps 1 to 8 from [Creating a New Travel Request](#).

2. Click the **Request Details** dropdown link.
3. Click **Add Cash Advance** from the dropdown.

The screenshot shows a travel request for a 'USA Conference' with a total amount of \$609.00. The 'EXPENSES' section is displayed, listing three items: Hotel Reservation, Air Ticket, and Daily Allowance. The 'Add Cash Advance' button is highlighted with an orange box. At the top right, there are 'More Actions' and 'Submit Request' buttons.

	Details	Date	Amount	Requested
Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00
Daily Allowance	Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00
			\$609.00	

Result: The New Cash Advance popup window will appear.

4. Enter the amount of the cash advance. Add attachments, if necessary, by clicking **Manage Attachments**.
 5. Make sure to enter a **Cash Advance Justification** comment.
- Note:** You may click the Quick Help icon next to the Cash Advance Justification field for examples of allowable reasons for a cash advance.
6. Click the **Save** button.

The screenshot shows the 'Cash Advance' form. It includes fields for 'Cash Advance Amount' (set to 400.00), 'Currency' (set to US Dollar), and a 'Justification' text area. The 'Save' button is highlighted with an orange box. A note at the bottom states: 'Used as an example for training purposes only.'

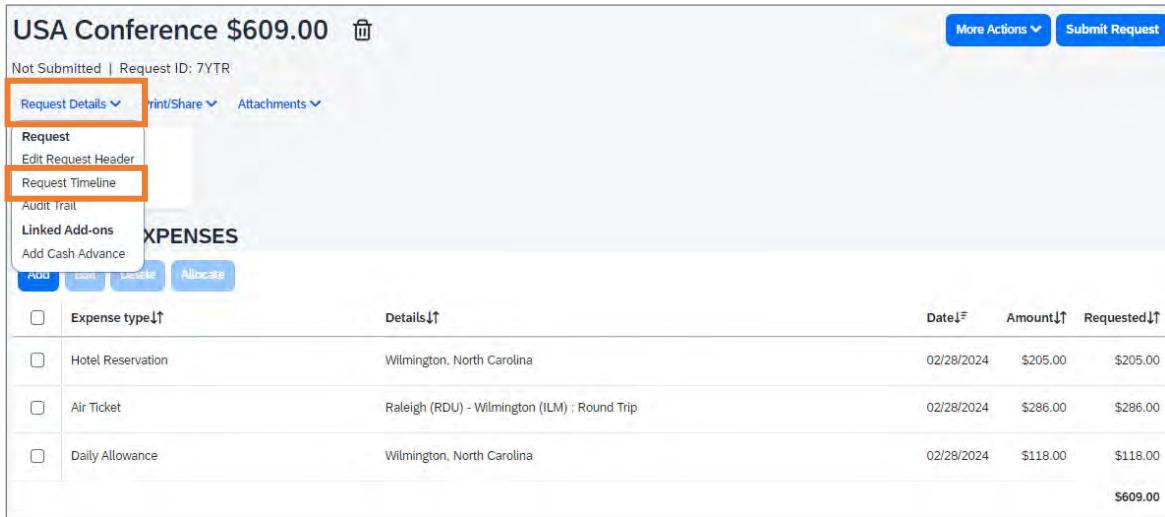
7. Click the **▼** to expand the Alerts section to review the notice.



Result: The cash advance has been added to the Travel Request.

Adding Approvers to the Workflow

1. Open the Travel Request if it is not already selected.
2. Click the **Request Details** drop-down link.
3. Select **Request Timeline** from the drop-down options.



The screenshot shows the 'USA Conference \$609.00' travel request details page. At the top right are 'More Actions' and 'Submit Request' buttons. Below them is a dropdown menu with 'Request Details' (highlighted with a red box), 'Print/Share', and 'Attachments'. A sub-menu for 'Request' includes 'Edit Request Header' and 'Request Timeline' (also highlighted with a red box). Other options like 'Audit Trail' and 'Linked Add-ons' are listed. The main area shows 'EXPENSES' with a table of items:

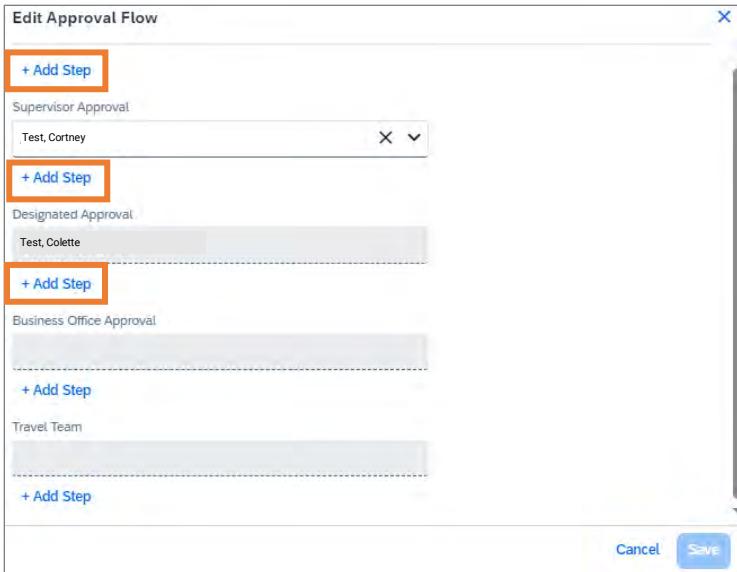
Expense type↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/> Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
<input type="checkbox"/> Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00
<input type="checkbox"/> Daily Allowance	Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00
				\$609.00

4. Click the **Edit** link.



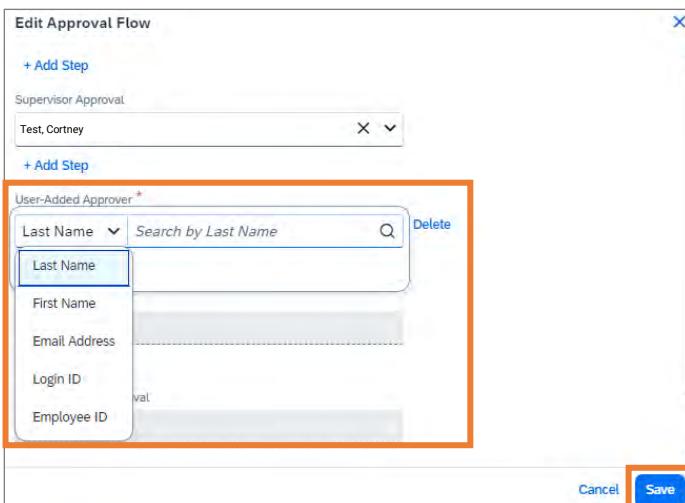
The screenshot shows the 'Request Timeline' edit dialog. On the left is the 'Approval Flow' section with four steps: 'Supervisor Approval' (Alston, Cortney), 'Designated Approval' (Brown, Collette S.), 'Business Office Approval', and 'Travel Team'. The 'Edit' button is highlighted with a red box. On the right is the 'Request Summary' section, which currently says 'No Summary.' and 'This request has not been submitted'. There is also an 'Add Comment' link.

5. Click the **Add Step** link in the timeline of where you want to add an additional approver to the workflow.



Result: A User-Added Approver lookup field will appear.

6. Search for and select the additional approver.
7. Click the **Save** button.



Result: The additional approver is added to the Approval Flow.

8. Click the **x** to close the window.

Viewing the Audit Trail

You can view the current status of your approval workflow and actions in the Audit Trail.

Follow these steps to view the Audit Trail:

1. Open the Travel Request if it is not already selected.
2. Click the **Request Details** drop-down link.
3. Select **Audit Trail** from the drop-down options.

The screenshot shows a travel request for "USA Conference \$609.00". The "Request Details" dropdown menu is open, with "Audit Trail" highlighted. The main content area displays expense details:

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00
Daily Allowance	Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00
\$609.00				

Result: The Audit Trail will appear and show Request Level details.

The screenshot shows the "Audit Trail" window for the same travel request. The "Request Level" section displays a single entry:

Date/Time	Updated By	Action	Description
08/03/2020 1:00 PM	Test, Courtney	Workflow Step Added	Added a workflow step with approver : Spares, Rebecca

The "Expected Expense Level" section is empty, showing a "No Data" message.

4. Click the **x** or the **Close button** to close the window.

Adding Attachments to a Travel Request

Some travel will require documentation to be submitted along with a travel request.

Follow these steps to add an attachment to a travel request:

1. Open the Travel Request if it is not already selected.
2. Click the **Attachments** drop-down link.

3. Click **Attach Documents** from the drop-down options.

The screenshot shows a Concur expense report for a "USA Conference" with a total amount of \$609.00. The "Attachments" dropdown menu is open, with the "Attach Documents" option highlighted by a red box. Other options like "Request Details" and "Print/Share" are also visible. Below the attachments section, there's a table titled "EXPECTED EXPENSES" listing items such as Hotel Reservation, Air Ticket, and Daily Allowance, along with their details and amounts.

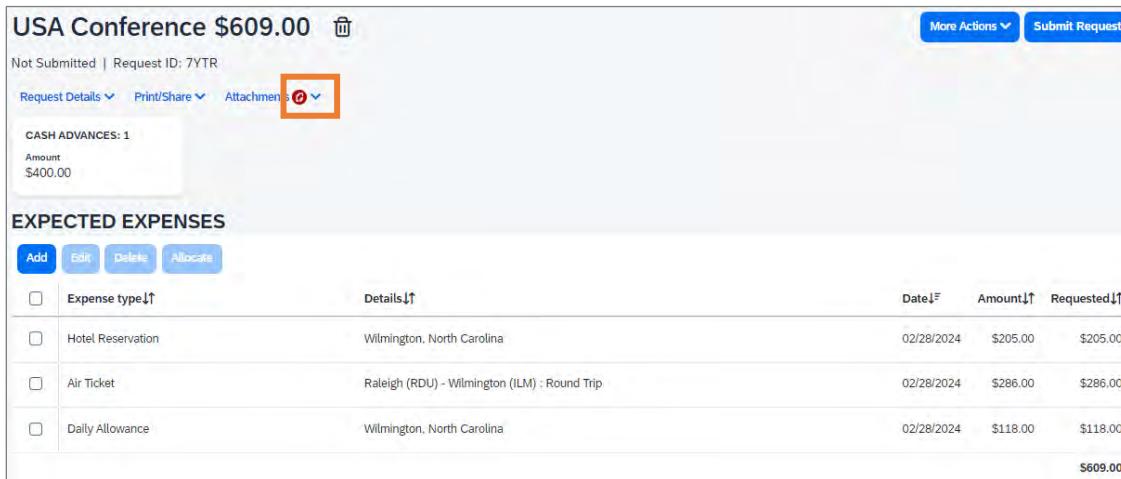
Result: A pop-up window will appear for you to add the attachment.

4. Click the **Upload and Attach** link.



5. Select the file you want to attach.

Result: The attachment will upload and an attachment icon will appear.



The screenshot shows a travel expense report form titled "USA Conference \$609.00". At the top right are "More Actions" and "Submit Request" buttons. Below the title, it says "Not Submitted | Request ID: 7YTR". There are links for "Request Details", "Print/Share", and "Attachments" (which is highlighted with a red box). Under "CASH ADVANCES: 1", there is one entry for an amount of \$400.00. The main section is "EXPECTED EXPENSES", which includes buttons for "Add", "Edit", "Delete", and "Allocate". A table lists three expense items: Hotel Reservation (\$205.00), Air Ticket (\$286.00), and Daily Allowance (\$118.00). The total amount shown at the bottom is \$609.00.

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00
Daily Allowance	Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00

Note: Once a document is attached, click on the **Attachments** drop-down link to view, delete, or attach more documents. If attaching multiple documents, the files will be merged into one and cannot be separated.

7. Creating International Travel Requests

Export Control

When you create a travel request that includes international travel, you may need approval from the Export Control Office. Export Control laws and regulations are complex and carry significant criminal and civil liability for both the traveler and the university. If you have questions as to how or when the regulations apply, please reach out directly to the [Export Control Program](#) or visit our [website](#).

Global Travel

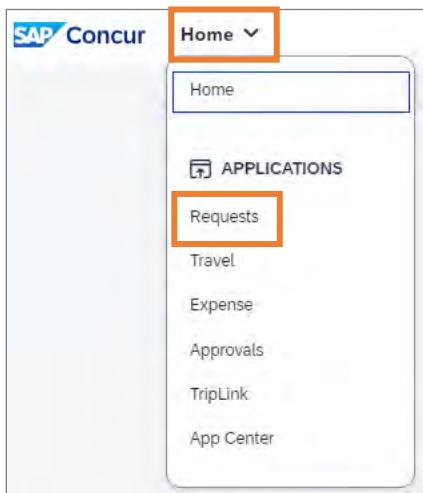
UNC-Chapel Hill Global encourages safe, culturally respectful global travel by University students, faculty, and staff. To make those travels as successful and safe as possible, the University has established travel policies to help protect members of the UNC-Chapel Hill community.

Requirements for international travel are outlined on the University's [Travel and Global Operations for Travel Requirements and Policy](#) webpage. Travel to certain countries may be subject to additional restrictions or review. For guidance on planning your trip, visit the University's [Travel and Global Operations Preparing for International Travel](#) webpage.

8. Managing a Travel Request

You can make edits and changes to a travel request. Depending on the type of change you are needing to make, follow these steps to manage a travel request:

1. Click the **Home dropdown** and then **Requests**.



2. Click the travel request you want to manage.

The screenshot shows the 'Manage Requests' page. At the top, there's a breadcrumb trail: 'Home / Requests / Manage Requests'. Below it is the title 'Manage Requests' and a 'Request Library' section. On the right, there are buttons for 'View Active Requests' and 'Create New Request'. The main area displays two travel requests in a grid format. The first request, 'USA Conference' (02/28/2024 | 7YTR), has a total cost of '\$609.00' and is labeled 'Not Submitted'. The second request, 'MINT Conference' (12/12/2023 | 7MHT), has a total cost of '\$470.36' and is labeled 'Approved'. Both requests have their respective dates and descriptions in smaller text above the cost.

Result: The details of the travel request will appear.

Copying a Travel Request

Copying a Travel Request allows you to quickly create the same Travel Request for another trip.

Note: If the original request has attachments, you must attach those documents again to the copied Travel Request. Also, if the original request has workflow modifications, you must adjust the workflow modification to the copied Travel Request. Follow these steps to copy a travel request:

1. Follow steps 1 to 2 from [Managing a Travel Request](#).
2. Click **More Actions** and then the **Copy Request** link.

The screenshot shows a travel request detail page for "USA Conference \$609.00". The page includes sections for "CASH ADVANCES: 1" (Amount: \$400.00), "EXPECTED EXPENSES" (with rows for Hotel Reservation, Air Ticket, and Daily Allowance), and a "More Actions" menu with options like "Copy Request" highlighted.

Result: A Copy Request pop-up window will appear.

3. Enter a **New Request Name** for the Travel Request
4. Enter a **Starting Date for New Request** for the copied request, if applicable.
5. Mark the Cash Advance/Expenses checkbox checked if you want to transfer the original expense(s) to the copied Travel Request.
6. Click the **Create New Request** button.

The screenshot shows the "Copy Request" dialog box. It contains fields for "New Request Name" (set to "Copy of USA Conference"), "Starting Date for New Request" (set to "02/29/2024"), and a "Include" section with checkboxes for "Cash Advance" and "Expenses", both of which are checked. The "Create New Request" button is at the bottom right.

Results:

- The new request is created from the original travel request and you can make any necessary edits prior to submitting the request.
- When the request is saved a new Request ID number is generated. The Request ID number can be used to look up a Request in the Concur system.

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Wilmington, North Carolina	02/29/2024	\$205.00	\$205.00
Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/29/2024	\$286.00	\$286.00
Daily Allowance	Wilmington, North Carolina	02/29/2024	\$118.00	\$118.00

Editing a Travel Request

You can only edit or delete travel requests that have a status of Not Submitted. Follow these steps to edit a travel request:

Editing Expected Expenses

- Follow steps 1 to 2 from [Managing a Travel Request](#).
- Select the travel expense you want to edit, then click **Edit**.

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Wilmington, North Carolina	02/28/2024	\$205.00	\$205.00
Daily Allowance	Wilmington, North Carolina	02/28/2024	\$118.00	\$118.00
Air Ticket	Raleigh (RDU) - Wilmington (ILM) : Round Trip	02/28/2024	\$286.00	\$286.00

Result: Details of the expense will appear.

3. Make any necessary edits.

Check-In
Date: 02/28/2024 At: hh:mm A City: * Wilmington, North Carolina

Check-Out
Date: 02/29/2024 At: hh:mm A

Vendor: (Comfort Inns) Comfort Inns

Estimated Amount *: 205.00 Currency: US, Dollar

Comment: 0/2000

Save Cancel

4. Click the **Save** button.

Editing the Request Header

1. Follow steps 1 to 2 from [Managing a Travel Request](#).
2. Click the **Request Details** drop-down link.
3. Click **Edit Request Header** from the drop-down options.

Not Submitted | Request ID: 7YTR

Request Details ▾ Print/Share ▾ Attachments ② ▾

Request

Edit Request Header

EXPENSES	Date	Amount	Requested
Hotel Reservation	02/28/2024	\$205.00	\$205.00
Air Ticket	02/28/2024	\$286.00	\$286.00
Daily Allowance	02/28/2024	\$118.00	\$118.00
			\$609.00

Result: Edit Request Header page will appear.

4. Make any necessary edits.

The screenshot shows the 'Edit Request Header' interface. It's a form with various input fields and dropdown menus. Key fields include 'Request Name' (USA Conference), 'Requester Type' (Faculty/Staff), 'RequestTrip Purpose' (Conference), 'RequestTrip Start Date' (02/28/2024), 'RequestTrip End Date' (02/29/2024), 'RequestTrip Type' (In-State), 'Destination City' (Wilmington, North Carolina), 'Destination Country' (UNITED STATES (US)), 'Business Unit' (0500 (UNCC) UNC Chapel Hill), 'Dept ID', 'Fund', 'PC Business Unit', 'PC Activity ID', 'Program', 'Cost Code 1', and 'Cost Code 2'. There are also dropdowns for 'Additional Information', 'Project ID', and 'Source'. At the bottom right are 'Cancel' and 'Save' buttons.

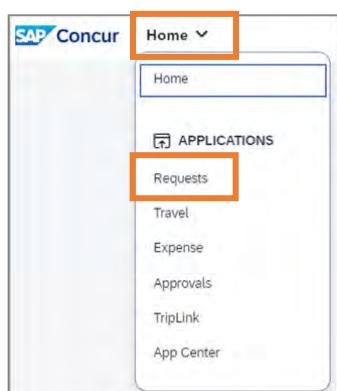
5. Click the **Save** button.

Recalling a Submitted Travel Request

If you have submitted a travel request and need to make edits, you will need to recall the request, then make any necessary edits once the status changes to Not Submitted.

A Request can be recalled as long as it is not fully approved or if a Travel Request is fully approved, it can be recalled if the travel dates are in the future and there have been no Expense Reports submitted for it. Also, if a Request is recalled during the approval process, it will go through the entire workflow approval process again. Follow these steps to recall a submitted travel request:

1. Click the **Home** dropdown and then **Requests**.



2. Click the travel request you want to recall.

Manage Requests

Request Library

View Active Requests Create New Request

USA Conference 02/28/2024 7YTR \$609.00 Not Submitted	⚠ Copy of MINT Conference 12/13/2023 99GF \$470.36 Submitted Submitted & Pending Supervisor Approval Alston, Cortney	MINT Conference 12/12/2023 7MHT \$470.36 Approved
---	--	---

3. Click the **Recall** button.

Copy of MINT Conference \$470.36

Submitted & Pending Supervisor Approval | Request ID: 99GF

Request Details Print/Share Attachments

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Charlotte, North Carolina	12/13/2023	\$259.00	\$259.00
Mileage Personal Car		12/13/2023	\$73.36	\$73.36
Daily Allowance	Charlotte, North Carolina	12/13/2023	\$138.00	\$138.00
			\$470.36	

Result: A confirmation pop-up message will appear.

4. Click the **Yes** button.



Result: The Travel Request is now recalled, can be edited, cancelled, and/or resubmitted. Also, on the Manage Requests page the status of the request has changed from Submitted (green header) to Returned (red header)

The top screenshot shows the 'Copy of MINT Conference' request details. The status is 'Sent Back to User'. The bottom screenshot shows the 'Manage Requests' library with three cards:

- USA Conference: 02/28/2024 | 71TR. \$609.00 (Not Submitted)
- Copy of MINT Conference: 12/13/2023 | 99GF \$470.36 (Returned)
- MINT Conference: 12/12/2023 | 7MHHT \$470.36 (Approved)

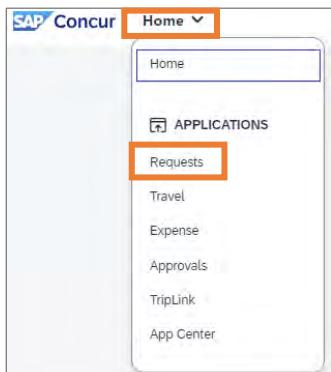
Cancelling a Travel Request

If a travel request is not going to take place it should be deleted.

Important: Cancelling a request is a permanent action that cannot be reversed.

Follow these steps to cancel a travel request:

1. Click the **Home dropdown** and then **Requests**.



- Click the travel request you want to cancel.

Manage Requests

Request Library

Request ID	Description	Status	Amount
USA Conference	02/28/2024 7YTR	Not Submitted	\$609.00
Copy of MINT Conference	12/13/2023 99GF	Submitted	\$470.36
MINT Conference	12/12/2023 7MHT	Approved	\$470.36

Submitted & Pending Supervisor Approval
Alston, Cortney

- Click the **More Actions** dropdown.

Copy of MINT Conference \$470.36

Submitted & Pending Supervisor Approval | Request ID: 99GF

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Charlotte, North Carolina	12/13/2023	\$259.00	\$259.00
Mileage Personal Car		12/13/2023	\$73.36	\$73.36
Daily Allowance	Charlotte, North Carolina	12/13/2023	\$138.00	\$138.00
			\$470.36	

- Select **Cancel Request**.

Copy of MINT Conference \$470.36

Submitted & Pending Supervisor Approval | Request ID: 99GF

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Charlotte, North Carolina	12/13/2023	\$259.00	\$259.00
Mileage Personal Car		12/13/2023	\$73.36	\$73.36
Daily Allowance	Charlotte, North Carolina	12/13/2023	\$138.00	\$138.00
			\$470.36	

Result: A confirmation pop-up window will appear.

- Add an explanation comment for cancelling the request and then click **OK**.

Cancel Request

Add a comment to explain why you are cancelling the request. Then click OK to confirm the cancellation.

Comment:

Comment

CANCEL OK

Result: The Travel Request is canceled and is no longer listed as an Active Request in the Request Library.

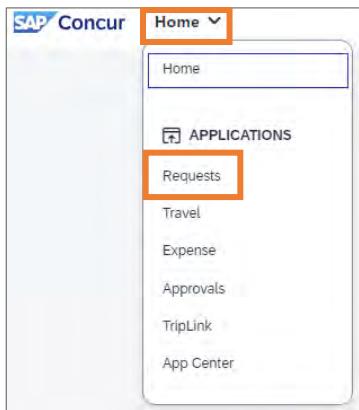
Closing a Travel Request

A travel request can be closed. This is different from canceling a request. Closing a request should be used to closeout a request when it has been fully expensed but still has a remaining balance.

Important: Closing is a permanent action that cannot be reversed.

Follow these steps to close a request:

1. Click the **Home dropdown** and then **Requests**.

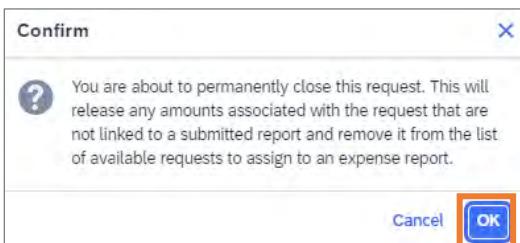


2. Click the travel request you want to close.
3. Click the **More Actions** drop-down button.
4. Click **Close Request** from the drop-down options.

A screenshot of a travel request detail view. At the top, it shows "MINT Conference \$470.36" and "Approved | Request ID: 7MHT". Below this are buttons for "Request Details", "Print/Share", and "Attachments". A "REPORTS: 2" section shows "Amount: \$170.76" and "Remaining: \$299.60". Under "EXPECTED EXPENSES", there is a table with three rows: "Hotel Reservation" (Charlotte, North Carolina, 12/12/2023, \$259.00, \$259.00), "Mileage Personal Car" (12/12/2023, \$73.36, \$73.36), and "Daily Allowance" (Charlotte, North Carolina, 12/12/2023, \$138.00, \$138.00). The total is "\$470.36". On the right side, there is a "More Actions" dropdown menu with options: "Copy Request", "Cancel Request", and "Close Request", with "Close Request" highlighted by a red box. Above the "More Actions" menu is a "Create Expense Report" button.

Result: A confirmation pop-up message will appear.

5. Click the **OK** button.



Result: The Travel Request is closed and is no longer listed as an Active Request.

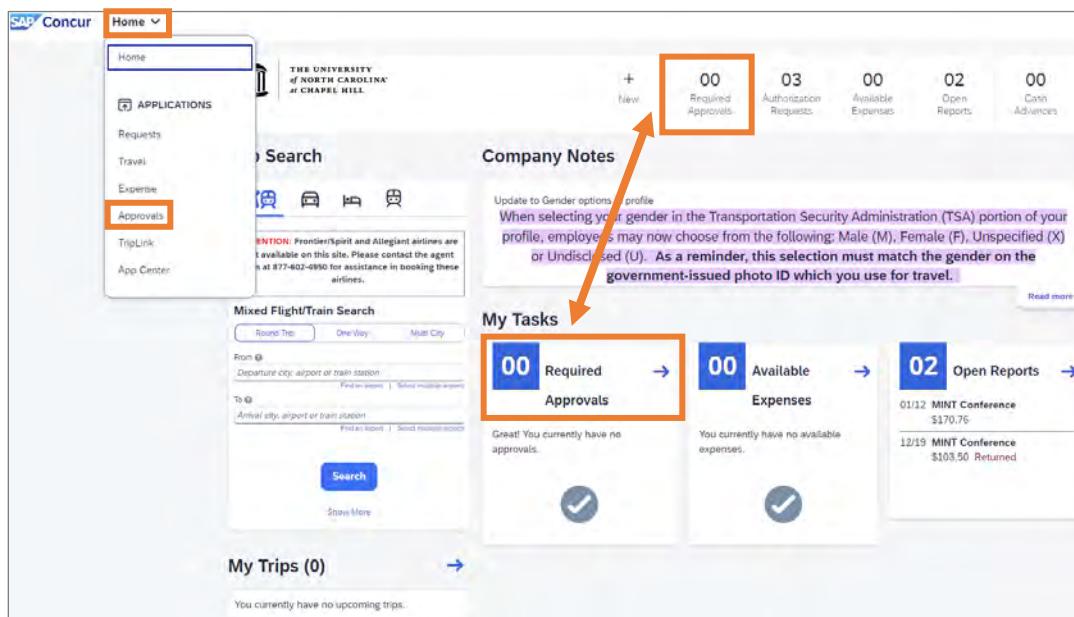
9. Reviewing and Approving Travel Requests

If you are given the role of an approver in Concur, you will receive an email notification when travel requests are submitted by a user. Approval delegates may also receive email notifications and be able to preview or approve requests, depending on their assigned permissions. To approve requests, you must log in to the Concur system.

Approving a Travel Request

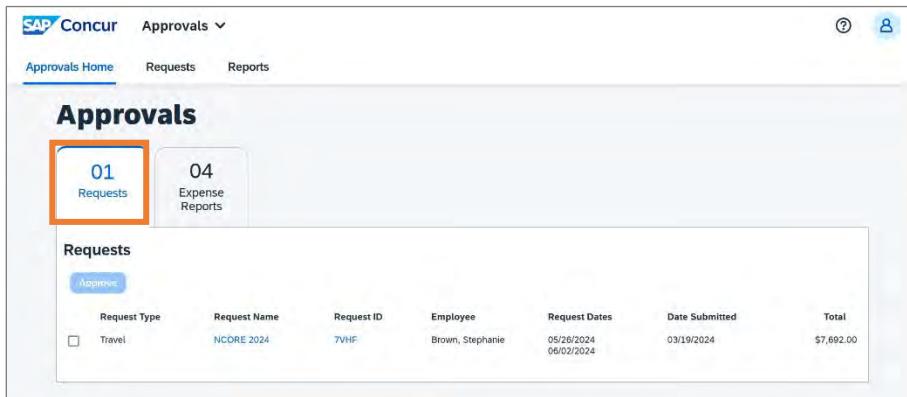
Follow these steps to approve a travel request:

1. From the Concur home page, click the **Home drop-down** and then **Approvals** or one of the **Required Approvals** tiles.



Result: You will be brought to the Approvals page.

2. Click the **Requests** tab if you are not immediately brought to that tab.



The screenshot shows the SAP Concur Approvals interface. At the top, there's a navigation bar with the SAP Concur logo, the word "Approvals", and a dropdown menu. Below the navigation bar, there are three tabs: "Approvals Home" (underlined), "Requests", and "Reports". The main area is titled "Approvals" and contains two large buttons: "01 Requests" (which is highlighted with an orange border) and "04 Expense Reports". Underneath these buttons, there's a section titled "Requests" with a "Approve" button. A table follows, showing travel request details:

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
<input type="checkbox"/> Travel	NCORE 2024	7VHF	Brown, Stephanie	05/26/2024 06/02/2024	03/19/2024	\$7,692.00

Result: You will see a listing of the travel requests that are pending your approval.

3. Click on the **Request Name** link to review the details of the travel request.
4. Review the Travel Request.

Important: Review all elements of the Request carefully including cash advances, third-party lodging requests, personal travel, etc. Approval of the Request signifies your approval of all elements of the Request.

Notes:

- If you need to allocate anticipated expenses, mark the designated checkbox by the expense, then click the Allocate button. For more details on how to allocate an expense view the [Allocating Expenses](#) section. Department Approvers may want to allocate anticipated expenses so that the correct approvers are incorporated into the approval workflow.
- Allocations created on the Travel Request will copy over the accompanying Expense Report and may be updated as needed.

5. Click the **Approve** button.

The screenshot shows the SAP Concur Approvals Requests interface. At the top, there's a navigation bar with 'SAP Concur' and 'Approvals'. Below it, a sub-navigation bar has 'Requests' selected. The main content area displays a travel request for 'NCORE 2024 \$7,692.00'. The request is submitted by 'Test, Cortney' and is in a 'Pending Designated Approver Approval' status with Request ID '7VHF'. A 'More Actions' dropdown menu is open, and the 'Approve' button is highlighted with a red box. Below the request details, there's a section titled 'EXPECTED EXPENSES' with a table showing three items: 'Ground Transportation' (\$100.00), 'Hotel Reservation' (\$3,000.00), and 'Air Ticket' (\$1,600.00).

Result: The UNC-Approver Submit Agreement pop-up message appears.

6. Click the **Accept & Continue** button.



Result: The Travel Request is approved, and it will no longer be shown on your list of Approvals.

Sending a Travel Request Back to a User

If you have reviewed a travel request and find that you need to send it back to the user for further edits you can send the travel request back. Also, the submitter of the request may ask that you send it back for edits as well. Follow these steps to send a travel request back to a user:

1. Follow steps 1 to 3 from [Approving a Travel Request](#).
2. Click the **More Actions** button.

- Click **Send Back to Employee** from the drop-down options.

The screenshot shows the SAP Concur Approvals interface. At the top, it says "SAP Concur Approvals". Below that, there are tabs for "Approvals Home", "Requests" (which is selected), and "Reports". The main content area shows a travel request for "NCORE 2024 \$7,692.00" submitted by "Test, Cortney". The status is "Submitted & Pending Designated Approver Approval" with Request ID "7VHF". Below this, there are buttons for "Request Details", "Print/Share", and "Attachments". A "More Actions" button is visible, with a dropdown menu showing "Edit Approval Flow", "Approve & Forward", and "Send Back to Employee", the latter being highlighted with a red box. The "EXPECTED EXPENSES" section lists items like "Ground Transportation", "Hotel Reservation", and "Air Ticket" with their details and amounts.

Result: A Send Back to Employee pop-up message appears.

- Enter your comments, explaining why you are returning the request.
- Click the **Send Back** button.

The screenshot shows a "Send Back to Employee" dialog box. At the top, it says "Send Back to Employee" and has a close button. Below that is a "Comment History" section with a table showing a single entry: "03/29/2024" (Entered By: Concur System) and "Request's approval time expired and it was sent to the System Processor." The main area is titled "Add Comment" and contains a text input field with placeholder text "Reason for Sending Back the Request*". At the bottom, there are "Cancel" and "Send Back" buttons, the latter being highlighted with a red box.

Result: The Travel Request is sent back to the user and it will no longer be shown on your list of Approvals.

Adding an Additional User or Business Officer for Approval

Follow these steps to add an additional user or business officer for approval:

- Follow steps 1 to 3 from [Approving a Travel Request](#).
- Click the **More Actions** button.

- Click **Edit Approval Flow** from the drop-down options.

The screenshot shows the SAP Concur interface for managing requests. At the top, there's a navigation bar with 'SAP Concur' and 'Approvals' dropdown. Below it, 'Approvals Home', 'Requests' (which is underlined), and 'Reports' are listed. The main content area shows a request titled 'NCORE 2024 \$7,692.00' submitted by 'Test, Cortney'. It indicates the request is 'Submitted & Pending Designated Approver Approval' with Request ID: 7VHF. A 'More Actions' dropdown menu is open, with 'Edit Approval Flow' highlighted by a red box. Other options in the menu include 'Approve', 'Approve & Forward', and 'Send Back to Employee'. Below the request details, there's a section titled 'EXPECTED EXPENSES' with a table showing four expense items: 'Ground Transportation', 'Hotel Reservation', and 'Air Ticket'. The 'Air Ticket' row has a question mark icon next to it. At the bottom of the page, there are buttons for 'Add', 'Edit', 'Delete', and 'Allocate'.

Result: The Edit Approval Flow pop-up window appears.

- Click the **Add Step** link in the timeline where you want to add an additional approver to the workflow.

The screenshot shows the 'Edit Approval Flow' dialog box. It lists several approval steps: 'Supervisor Approval' (System, Concur), 'User-Added Approver' (Test, Cortney), and 'Designated Approval' (Test, Rebecca). Below these, there are two 'Add Step' buttons: one for 'User-Added Approver' and one for 'Business Office Approval'. The 'User-Added Approver' 'Add Step' button is highlighted with a red box. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Result: A User-Added Approver lookup field will appear.

- Search for and select the additional approver in the User-Added Approver field.

6. Click the **Save** button.

The screenshot shows the 'Edit Approval Flow' dialog box. At the top, there are three sections: 'Supervisor Approval' (System, Concur), 'User-Added Approver' (Test, Cortney), and 'Designated Approval' (Test, Rebecca). Below these is a '+ Add Step' button. The 'User-Added Approver' section is highlighted with an orange box. It contains a search interface with a dropdown menu set to 'Last Name', a search input field with placeholder 'Search by Last Name', a magnifying glass icon, and a 'Delete' button. Below the search interface, the message 'No Results Found' is displayed. At the bottom of the dialog are 'Cancel' and 'Save' buttons, with 'Save' being the one highlighted by the orange box.

Result: The additional approver is added to the Approval Flow.

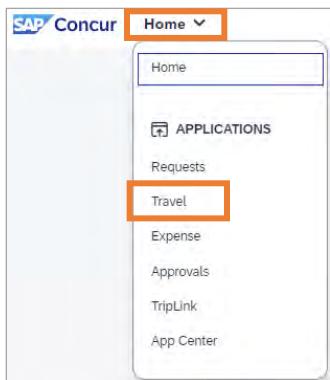
10. Making Reservations & Booking Travel

Booking a Trip on Concur Travel is similar to how you would book a personal trip online. The Concur Travel element of the system allows users to book travel that can include Flight/Train, Rental Car, and/or Hotel. Users of the system can book travel themselves as the Traveler or utilize a designated Travel Assistant/Arranger to make the booking and travel reservations.

Booking a Flight

If a Traveler needs to make reservations for a trip that includes a flight/train, the booking process will always begin with booking a flight/train, regardless if lodging, and car rental are needed as well. You will have the opportunity to specify that you need a car and/or hotel on the Flight/Train tab. Follow these steps to book a flight/train:

1. From the Concur **Homepage drop-down**, select **Travel**.



Result: by default, the Flight/Train tab option will be selected.

2. Select one of the following:

- **Round Trip**
- **One Way**
- **Multi City**

The screenshot shows the 'Trip Search' interface. At the top, there are four icons: a blue airplane, a red bus, a green car, and a yellow train. Below them is a box containing an 'ATTENTION' message: 'Frontier/Spirit and Allegiant airlines are not available on this site. Please contact the agent team at 877-602-4950 for assistance in booking these airlines.' Underneath is a section titled 'Mixed Flight/Train Search' with three buttons: 'Round Trip' (highlighted with an orange border), 'One Way', and 'Multi City'. Below these buttons are two input fields: 'From' and 'To', each with a placeholder 'Departure city, airport or train station' and links to 'Find an airport' and 'Select multiple airports'. At the bottom is a large blue 'Search' button.

3. In the **From** and **To** fields, enter the cities for travel.

Note: When you enter a city, airport name, or airport code, the system will automatically search for a match. You can also use the Find an airport link or select multiple airport links as needed.

4. In the **Depart** and **Return** fields, select the appropriate dates and times.
5. If you need a hotel and/or car rental mark the **Pick-up/Drop-off car at airport** and/or **Find a Hotel**. Otherwise, continue to the next step.

6. Click the **Search** button.

Trip Search

ATTENTION: Frontier/Spirit and Allegiant airlines are not available on this site. Please contact the agent team at 877-602-4950 for assistance in booking these airlines.

Mixed Flight/Train Search

Round Trip One Way Multi City

From: RDU - Raleigh/Durham Airport - Raleigh/Durham, NC
To: LAX - Los Angeles Intl Airport - Los Angeles, CA

Depart: 04/09/2024 depart 09:00 am ± 2
Return: 04/12/2024 depart 05:00 pm ± 2

Pick-up/Drop-off car at airport
 Find a Hotel

Class: Economy class Search by: Schedule

Specify a carrier

Search

Result: A pop-up to Expand Search Window? may display.

7. Review the information.
8. Click the **Yes** button to proceed and expand the search window.

Expand Search Window?

There are no nonstop flights from Los Angeles Intl Airport, Los Angeles (LAX) to Raleigh/Durham Airport, Raleigh/Durham (RDU) between: 03:00 PM and 07:00 PM.
There is at least one nonstop flight departing during the following hours: 09:00 AM, 10:00 AM, 10:00 PM.

Would you like to expand your search window to include nonstop flights?

Cancel **No** **Yes**

- Click the **Select** button next to the preferred itinerary for your departure flight.

Shop by Fares Shop by Schedule

Depart Return

Raleigh/Durham, NC - Tue, Apr 9

Flight Number Search Sorted By: Depart - Earliest

Displaying: 99 out of 99 results.
Previous | Page: 1 of 10 | Next | All

American Airlines	07:00a RDU → 08:08a CLT	Nonstop	Economy	Select
	09:11a CLT → 11:28a LAX	Nonstop	Economy	

7h 28m / American Airlines 683, American Airlines 1592 - [View seats](#)
Airbus Industrie A321 / 901 lbs CO₂ (Apollo)

United	07:00a RDU → 08:32a EWR	Nonstop	Economy	Select
	10:00a EWR → 12:53p LAX	Nonstop	Economy	

8h 53m / United 1525, United 2679 - [View seats](#)
Boeing 737 MAX 9, Boeing 787-900 / 1114 lbs CO₂ (Apollo)

American Airlines	07:00a RDU → 08:08a CLT	Nonstop	Economy	Select
	09:27a CLT → 11:31a DFW	Nonstop	Economy	
	12:20p DFW → 01:52p LAX	Nonstop	Economy	

9h 52m / American Airlines 683, American Airlines 2725, American Airlines 1540 - [View seats](#)
Airbus Industrie A321, 32Q / 918 lbs CO₂ (Apollo)

American Airlines	07:00a RDU → 08:08a CLT	Nonstop	Economy	Select
	11:31a CLT → 02:05p LAX	Nonstop	Economy	

10h 5m / American Airlines 683, American Airlines 352 - [View seats](#)
Airbus Industrie A321, 32Q / 901 lbs CO₂ (Apollo)

Note: When shopping by Schedule, the traveler must select a Departure and Return flight in order to see the total fare. To view itineraries by price, click the **Shop by Fares** tab. Then click the **View Fares** button next to the preferred itinerary to view available booking options. Then click the **blue fare button** for the desired fare option.

- Repeat step 9, to select the preferred itinerary for a return flight.

Result: The selected fare price will appear.

11. Click the blue button that displays the amount of the selected fare.

The screenshot shows a 'Selected Fare' section with two flight options. The first flight is with American Airlines, departing at 07:00a RDU and arriving at 11:28a LAX, with one stop at CLT, taking 7h 28m. The second flight is with Delta, departing at 11:15a LAX and arriving at 09:09p RDU, with one stop at ATL, taking 6h 54m. A red box highlights the total fare of '\$1,107.86' in a blue button. An 'Remove' link is also visible.

Result: The Review and Reserve Flight page will appear.

This flight is not in compliance with the following travel rule(s):

⚠ Air Fare is greater than the least cost logical airfare plus 100 dollars and All Flights are within the country/region: United States of America

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

— Please Choose a Reason —

Please explain why you have chosen this flight. NOTE: We will log flights which you did not take.

Save Cancel

The selected fare was: \$1107.86
The least cost logical fare was:\$687.45

Chosen:

Cost: \$1107.86

Outbound Flight

American Airlines	683	Raleigh/Durham Airport (RDU)	04/09/2024 7:00 AM	Charlotte Airport (CLT)	04/09/2024 8:08 AM	Airbus A321
American Airlines	1592	Charlotte Airport	04/09/2024 11:00 AM	Los Angeles	04/09/2024 11:00 AM	Airbus A321

Important: Fare that is flagged as "Out-of-Policy" can be booked. When selected the system will present the user with an Out-of-Policy pop-up window. Users must then select the reason this "out-of-policy" fare is being selected. Simultaneously, the system will maintain historical data of "in-policy" bookings that were available at the time as well.

12. Click the **Select a Seat** links in the Select Seats section to select your seat for departure and returning flights.

Select Seats

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

Flight	Seat
AA 683 Economy (K)	Select a seat
AA 1592 Economy (K)	Select a seat
DL 2264 Economy (Q)	Select a seat
DL 1518 Economy (Q)	Select a seat

13. Select a **Payment Method**.

14. Click the **Reserve flight and Continue** button.

Select a method of payment

How would you like to pay? [Add credit card](#)

* Indicates credit card is a company card

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

[Back](#) [Reserve Flight and Continue](#)

Result: The system reserves the flight and Travel Details page appears noting that the flight has been secured.

15. **Adding a Car:** If you marked the box Pick-up/Drop-off car at airport from step 5 the rental car search results will appear. Review the section, [*Booking a Rental Car*](#) for instructions on how to secure a car rental.

Adding a Hotel: If you marked the box Find a Hotel from step 5, hotel search results will appear. Review the section, [*Booking a Hotel*](#) for instructions on how to add hotel lodging.

16. Review the Total Estimated Cost and other itinerary information for your travel itinerary on the Travel Details page and make any necessary changes.

17. Click the **Next** button at the bottom of the page.

Total Estimated Cost	
Air	View Fare Rules
Airfare quoted amount:	\$412.97 USD
Taxes and fees:	\$55.57 USD
Airfare quoted amount:	\$495.81 USD
Taxes and fees:	\$60.29 USD
Total Estimated Cost:	\$1,024.64 USD
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
<small>If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.</small>	
Next >> Cancel Trip	

Note: If your trip does not include a car rental or hotel reservations a pop-up message will appear. Click the **OK** button.

18. Enter the **Trip Name**, **Trip Description**, and the **Concur Request ID number** associated with the travel.

Trip Booking Information	
<small>The trip name and description are for your record keeping convenience.</small>	
Trip Name <small>This will appear in your upcoming trip list.</small>	Trip Description (optional) <small>Used to identify the trip purpose</small>
Trip from Raleigh/Durham to Los Angeles	
<small>Concur Request ID [Required] – 4-characters and generated through the Pre-Travel request process [Required]</small>	

19. Click the **Next** button.

Result: The Trip Confirmation page will appear.

20. Click the **Purchase Ticket** button to confirm the itinerary.

Total Estimated Cost	
Air	View Fare Rules
Airfare quoted amount:	\$412.97 USD
Taxes and fees:	\$55.57 USD
Airfare quoted amount:	\$495.81 USD
Taxes and fees:	\$60.29 USD
Total Estimated Cost:	\$1,024.64 USD
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
<small>Almost done... Please confirm this itinerary.</small>	
Display Trip << Previous Purchase Ticket >> Cancel Trip	

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking a Rental Car

1. Complete one of the following:
 - If your travel does not require airfare and you only need to request a car rental, click the **Car** icon.

Or
 - If you marked the check box **Pick-up/Drop Off Car at airport** from step five in **Booking a Flight** continue to step 6.
2. Enter your **Pick-up and Drop-off dates and times**.
3. In the Pick-up car at section, select one of the following:
 - Select **Airport Terminal** and enter the City or the Airport Code.
 - Select **Off-Airport** and enter, or search for the location.
4. Mark the check box **Return car to another location** if the Drop-off location will be different from the Pick-Up location and select the appropriate location.
5. Click the **Search** button.

The screenshot shows the 'Car Search' interface. At the top, there are four icons: a plane and suitcase, a car (which is highlighted with a blue border), a magnifying glass, and a gear. Below the icons, the title 'Car Search' is displayed. Underneath, there are two date selection boxes: 'Pick-up date' and 'Drop-off date', both with dropdown menus showing '12:00 pm'. A large orange box highlights these two fields. Below them is a section titled 'Pick-up car at' with a radio button labeled 'Airport Terminal' (which is selected) and another labeled 'Off-Airport'. A text input field below says 'Please enter an airport...' with a placeholder text area underneath. Another orange box highlights this entire section. At the bottom left, there is a checkbox for 'Return car to another location' and a link 'More Search Options'. At the bottom right, a large blue 'Search' button is highlighted with an orange box.

Result: Search results will appear, and you have the option to filter the search results.

- Select the **blue fare button** for the car you want to rent.

Displaying: 22 out of 134 results. [?](#)

Previous [1](#) [2](#) [3](#) Next | All

	Intermediate Car - \$53.30 per day (Apollo)	Total cost ?
	Automatic transmission Unlimited miles, Pick-up: Terminal: LAX Adults: 4, Large bags: 1, Small bags: 2 ? (Corporate rate)	\$77.56
Preferred Car Vendor for University of North Carolina / E-Receipt Enabled ?		Location details

Result: The Review and Reserve Car page will appear.

- Provide any rental car preferences and driver information, as necessary.
- Note:** In the Travel Details section, you can print/email the itinerary, change, or cancel the reservation.
- Click the **Reserve Car and Continue** button.

Review and Reserve Car

Review Rental Car

Enterprise Car Rental [Location Details](#)

Type	Pickup	Drop-off
Intermediate Car	Airport, Terminal	Airport, Terminal
Features	LAX, Los Angeles	LAX, Los Angeles
	12:00 pm Tue, 04/09/2024	12:00 pm Wed, 04/10/2024

Provide Rental Car Preferences

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max): ICARICARICARIC

Enter Driver Information

Ensure the name below matches the I.D. you have with you on the day of pick-up. [?](#)

Driver	Edit Review all
Name: Joshua Travis Ham	Phone: 9106128284 Email: jham001@email.unc.edu

Rental Car Agency Program [Add a Program](#)

No Program selected

Review Price Summary

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$53.30	Apr 09 - Apr 10	\$77.56*

Total Estimated Cost: \$77.56
Total Due Now: \$0.00**

* Rental provider's estimated amount. Exact fees unknown. Does not include additional fees incurred during time of travel.
** Remaining amount due at rental location.

[Back](#) [Reserve Car and Continue](#)

Result: The Travel Details Page will appear.

- Click the **Next** button.

Result: The Trip Booking Information page will appear.

- Enter a **Trip Name**, **Trip Description**, and the **Concur Request ID** number associated with the travel.

11. Click the **Next** button.

The trip name and description are for your record keeping convenience.

Trip Name This will appear in your upcoming trip list. Car/Hotel Reservation	Trip Description (optional) Used to identify the trip purpose
Concur Request ID [Required] – 4-characters and generated through the Pre-Travel request process [Required]	

Result: The Trip Confirmation page will appear.

12. Review the trip details.

13. Click the **Confirm Booking** button.

Total Estimated Cost

Car:	\$77.56 USD
Total Estimated Cost:	\$77.56 USD

Almost done... Please confirm this itinerary.

Display Trip << Previous **Confirm Booking>>** Cancel Trip

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking a Hotel

1. Complete one of the following:

- If your travel does not require airfare and you only need to request hotel lodging, click the **Hotel** icon.
Or
- If you marked the check box, **Find a Hotel** from step five in Booking a Flight continue to step 4.

2. Enter the **Check-in** and **Check-out Dates**.

3. Enter the search radius.

Note: You can choose to search near an airport, an address, or near another location.

4. Click the **Search** button.

The screenshot shows a 'Hotel Search' interface. At the top, there are icons for flight, car, and hotel. Below that is a title 'Hotel Search'. Underneath the title are two date input fields labeled 'Check-in Date' and 'Check-out Date', both with calendar icons. A large orange box highlights these two fields. Below these are search parameters: 'Search within 5 miles from' with a text input field containing '5', followed by radio buttons for 'Airport', 'Address', 'Company Location', and 'Reference Point / Zip Code'. The 'Reference Point / Zip Code' option is selected and has a checked radio button. Below this is a text input field with placeholder text '(e.g. "Statue of Liberty", "90210" or "Alexandria, VA")'. Further down are two dropdown menus for filtering results, with the top one showing 'Only show results containing:' and the bottom one showing 'None'. At the bottom right is a blue 'Search' button with white text.

5. If applicable, review the Hotel Per Diem Locations page. Then click the **Next** button.

Result: The Search results will appear, and you have the option to filter and/or sort the search results.

6. Review the search results:

- Click the **hotel picture** to see more images.
- Click **Hotel Details** to see contact information, street address, cancellation policy and information about the facility.
- Click **View Rooms** to see available room options and rates, amenities, and rules for cancellation policy.

- Click the **View Rooms** button next to the hotel you want to select.

The screenshot shows a map of the Los Angeles area with various neighborhoods and landmarks labeled. Below the map is a search results table. The first row for 'Quality Inn & Suites LAX Airport' has the 'View Rooms' button highlighted with a red box. Other columns in the table include the hotel name, address, distance from the user, and a 'Hotel details' link.

Rank	Hotel Name	Address	Distance	Rating	Action
1.	Quality Inn & Suites LAX Airport	4822 W Century Blvd, Inglewood, CA 90304	0.5 miles	★★★★★	View Rooms
2.	Comfort Inn Cockatoo near LAX Airport	11500 Acacia Ave, Hawthorne, CA 90250	3.38 miles	★★★★★	View Rooms

Result: The Review and Reserve Hotel page appears.

- Review the hotel rate rules and cancelation policies.

Note: Room Options marked with a red exclamation point icon cannot be booked due to University Travel guidelines and/or policy.

- Select the **blue hotel rental fee** button for the room you want to rent.

The screenshot shows the 'Room Options' section for the 'Comfort Inn Cockatoo near LAX Airport'. It lists several room types with their descriptions and prices. The last two options, 'One Global Travel 1 King Bed-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)' and 'One Global Travel 2 Queen Beds-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)', both have their '\$101' price buttons highlighted with a red box.

Room Type	Description	Price
Choice Privileges Adv Purch 1 King Bed-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)	Rules and cancellation policy	\$96
Choice Privileges Adv Purch 2 Queen Beds-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)	Rules and cancellation policy	\$96
Choice Privileges Adv Purch 1 King Bed-nonsmoking-accessible- Mobility And Hearing Accessible-doors Have (Apollo)	Rules and cancellation policy	\$96
One Global Travel 1 King Bed-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)	Rules and cancellation policy	\$101
One Global Travel 2 Queen Beds-nonsmoking-pillow Top Mattress-40 Inch Lcd-plasma Tv-free Hi-spd (Apollo)	Rules and cancellation policy	\$101

Result: The Review and Reserve Hotel page appears.

- Provide any hotel room preferences, if applicable.

- Select the **Method of Payment**.

12. Mark the check box to accept the rate details and cancellation policy.
13. Click the **Reserve Hotel and Continue** button.

Result: The Travel Details page appears.

The screenshot shows a 'Select a method of payment' section with a dropdown menu set to 'Please choose a credit card.' and a link to 'Add credit card'. A note below says '* Indicates credit card is a company card'. Below this is the 'Accept Rate Details and Cancellation Policy' section, which includes a note to review rate details and cancellation policy, a hotel name ('Comfort Inn Cockatoo near LAX Airport'), rate information ('TOTAL RATE: 346.19 USD'), and a 'RATE CHANGES OVER DURATION OF STAY' section. At the bottom, there's a checkbox labeled 'I agree to the hotel's rate rules, restrictions, and cancellation policy.' followed by 'Back' and 'Reserve Hotel and Continue' buttons. The 'Reserve Hotel and Continue' button is highlighted with an orange border.

14. Enter a **Trip Name**, **Trip Description**, and the **Concur Request Id** number associated with the travel.

The screenshot shows the 'Trip Booking Information' section. It has fields for 'Trip Name' (example: 'Hotel Reservation at LOS ANGELES INTL AIRPORT, LOS ANGELES, CA') and 'Trip Description (optional)' (example: 'Used to identify the trip purpose'). At the bottom, there's a field for 'Concur Request ID [Required] – 4-characters and generated through the Pre-Travel request process [Required]' with a note below it. Both the 'Trip Description' and 'Concur Request ID' fields are highlighted with an orange border.

15. Click the **Next** button.
 16. Click the **Confirm Booking** button.
- Result:** The Trip Confirmation page appears.
17. Review the details of the trip and make any changes if necessary.

18. Click the Confirm Booking button.

The screenshot shows a "Total Estimated Cost" page. At the top, it displays "Hotel: \$346.19 USD" and "Total Estimated Cost: \$346.19 USD". Below this, a message says "Almost done... Please confirm this itinerary." At the bottom, there are four buttons: "Display Trip", "<< Previous", "Confirm Booking>>" (which is highlighted with an orange border), and "Cancel Trip".

Result: The Finished page will appear stating that you have successfully booked your trip.

Booking Travel as an Assistant

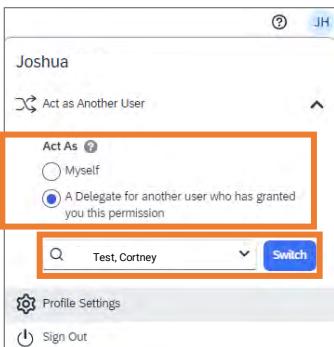
As an Assistant the Travel Arranger View makes it easy for you to manage travel for travelers. If you have been assigned to work as a Travel Assistant, your Traveler will define which task(s) you can complete:

Follow these steps to book travel as a Travel Assistant:

1. Follow steps 1 to 5, from section *Acting as a Travel Assistant*.

Result: You are acting on behalf of the selected Traveler and can begin booking trips as if you were the Traveler yourself.

2. Click the **Switch** button.



3. Click on the **Home page** drop-down and then select **Travel**.

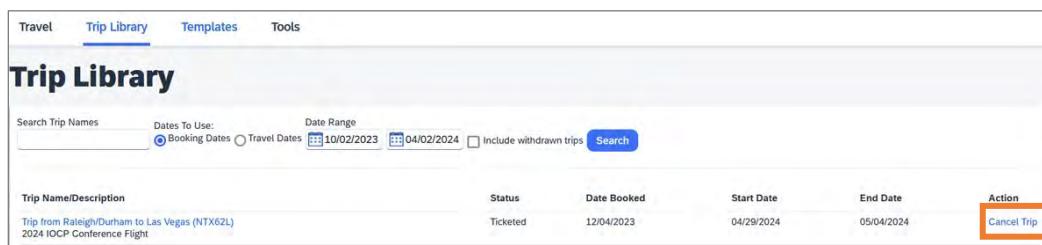
Result: Now you can begin booking travel on the Traveler's behalf, just as if you were booking travel for yourself.

Changing or Canceling a Trip

Flight changes may be available for Travelers that include a single carrier. Also, if the trip has been booked or ticketed, but has not occurred, you can change the time or date of the trip.

To cancel an entire trip, follow these steps:

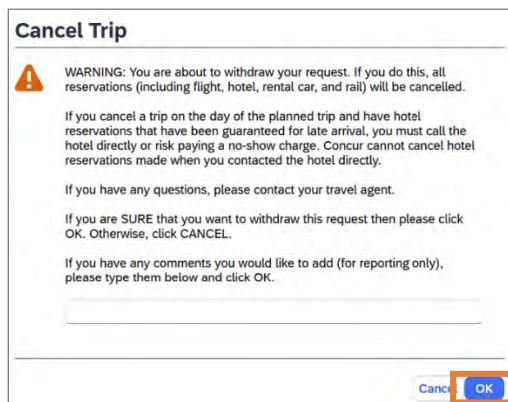
1. Click **Travel** on the Concur homepage drop-down.
2. Click the **Trip Library** tab.
Result: A listing of upcoming trips will appear.
3. Click the **Cancel Trip** link next to the trip you want to cancel.



The screenshot shows the 'Trip Library' section of the Concur interface. At the top, there are tabs for 'Travel', 'Trip Library' (which is selected and underlined), 'Templates', and 'Tools'. Below the tabs, there are search fields for 'Search Trip Names', 'Dates To Use:' (with radio buttons for 'Booking Dates' and 'Travel Dates', and date pickers for '10/02/2023' and '04/02/2024'), and a checkbox for 'Include withdrawn trips'. A 'Search' button is also present. The main area displays a table with columns: 'Trip Name/Description', 'Status', 'Date Booked', 'Start Date', 'End Date', and 'Action'. One row in the table is visible, showing a trip from 'Trip from Raleigh/Durham to Las Vegas (NTX62L)' with status 'Ticketed', booked on '12/04/2023', starting on '04/29/2024', ending on '05/04/2024', and an 'Action' column containing a 'Cancel Trip' link, which is highlighted with a red box.

Result: A Cancel Trip pop-up message will appear.

4. Click the **Ok** button on the pop-up message.



The screenshot shows a 'Cancel Trip' dialog box. At the top, it says 'Cancel Trip'. Below that is a warning message: 'WARNING: You are about to withdraw your request. If you do this, all reservations (including flight, hotel, rental car, and rail) will be cancelled.' It then provides instructions: 'If you cancel a trip on the day of the planned trip and have hotel reservations that have been guaranteed for late arrival, you must call the hotel directly or risk paying a no-show charge. Concur cannot cancel hotel reservations made when you contacted the hotel directly.' It also says 'If you have any questions, please contact your travel agent.' and 'If you are SURE that you want to withdraw this request then please click OK. Otherwise, click CANCEL.' There is a text input field for comments and two buttons at the bottom: 'Cancel' and 'OK', with 'OK' being highlighted with a red box.

Result: A confirmation message will appear stating that the trip has been successfully cancelled.

Note: If you are unable to change or cancel your Concur World Travel reservation, contact your World Travel, Inc agent for assistance.

11. Understanding Receipts

Most expenses will require a receipt. The Concur system will alert you when a required receipt is missing and when a Missing Receipt Declaration is not allowed. You can review [Procedure 1501.7 on Travel Expenses and Reimbursements](#) to learn more.

Receipts can be uploaded and attached to reports. Below are the various methods of submitting transaction information and receipt data into the Concur System:

Method	Where the receipt/transaction will appear in Concur
Airfare Direct Bill	Airfare Direct Billing transactions appear in the Available Expenses section.
Concur Mobile App	Receipts that are captured using the Concur Mobile App are automatically uploaded to the system and appear in the Available Expenses section.
Direct Upload	Receipts that are directly uploaded to the system appear in the Available Receipts section (or Available Expenses if you have enabled Expensel). Note: You can also directly upload receipts when creating an expense report.
E-Receipts	E-Receipts provided by TripLink appear in the Available Expenses section.
Email Receipts	Emailed receipts appear in the Available Receipts section (or Available Expenses if you have enabled Expensel).
T&E Card	T&E Card transactions appear in the Available Expenses section.

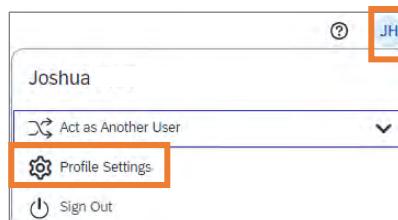
Enabling E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor. Also, you must opt-in from your profile before e-receipts can be activated. Once activated, eligible transactions will appear in the Available Expenses section, the same way that T&E Cards transactions appear.

Important: Some vendors may require additional paperwork before they can send e-receipt data.

Follow these steps to enable and activate e-receipts:

1. From the Concur home page complete either of the following:
 - a. Click the **Sign up here** link.
or
 - a. Click the **Profile** icon.
 - b. Click the **Profile Settings** link.

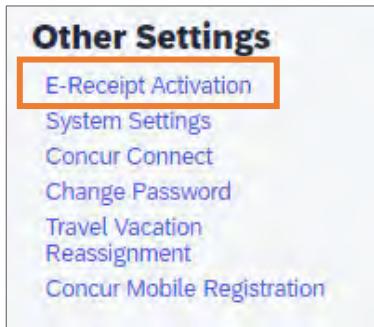


Result: You will be directed to the Profile Options page.

- c. Select **E-Receipts Activation** (in the Other Settings section on the left-side menu).

Result: The E-Receipt Activation appears.

2. Click the **E-Receipt Activation** link.



3. Read the information and then click the **Enable** link provided in the text.

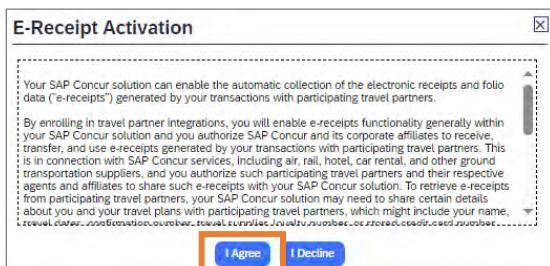
E-Receipt Activation

Save time on your expense reports. When you enable e-receipt syncing, receipts from participating suppliers will be added to your SAP Concur account and used to pre-populate expenses for you. [Enable](#)

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator.

Result: The E-Receipt Activation and User Agreement appears.

4. Click the **I agree** button.



Result: The E-Receipts confirmation appears.

Note: Once you have accepted the user agreement, your T&E Card will be opted in as well (if applicable).

Emailing Receipts

If the user has verified their email address with the Concur system, they have the ability to email receipts to receipts@concur.com. When receipts are emailed to the designated address, the receipt(s) will automatically upload to the Available Receipts section of the user's profile. If the user has enabled ExpensesIt, email receipts are turned

into expenses the same way that receipts that are captured using the Mobile App and will appear in their Available Expenses.

Uploading Receipts to Available Receipts

Users can choose to upload receipt images directly to the system in a supported format and view them in Available Receipts. These images are then available to that user (only) for the purpose of attaching to expense report entries.

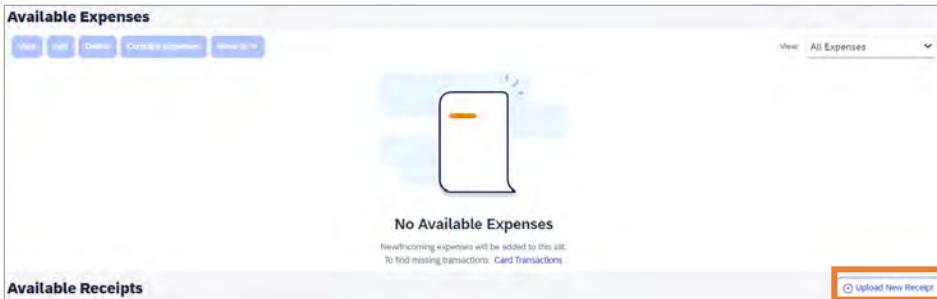
Users may also upload receipts using the Concur Mobile App. These receipts are uploaded to the Concur system automatically and can be viewed in Available Expenses. If the User has enabled ExpensesIt, uploaded receipts will also be listed in Available Expenses.

Follow these steps to upload a receipt into your available receipts:

1. Open the Manage Expense page by clicking on the **Available Expenses** tab or tile.

The screenshot shows the SAP Concur Home page. At the top, there is a navigation bar with several tabs: '+ New' (00), 'Required Approvals' (03), 'Authorization Requests' (00), 'Available Expenses' (00, highlighted with a red box and an arrow), 'Open Reports' (02), and 'Cash Advances' (00). Below the navigation bar, there are sections for 'Trip Search' (Mixed Flight/Train Search), 'Company Notes' (with a note about gender selection for TSA), 'My Tasks' (Required Approvals, Available Expenses, and Open Reports), and 'My Trips' (0). The 'Available Expenses' section is specifically highlighted with a red box and an arrow pointing to it from the top navigation bar.

2. Click the **Upload New Receipt** button in the Available Receipts section.



Result: A pop-up window will appear for you to select the receipt to upload.

Note: The system accepts file attachments in PDF, JPG, HTML, TIF or TIFF formats.

3. Select the file to be uploaded. (These steps will vary depending on your device's operating system.)

Result: The image of the receipt will appear in the Available Receipts Section of the screen.



Note: if the User has enabled Expenselt, the uploaded receipt will be turned into an expense and appear in the Available Expenses section of the screen.

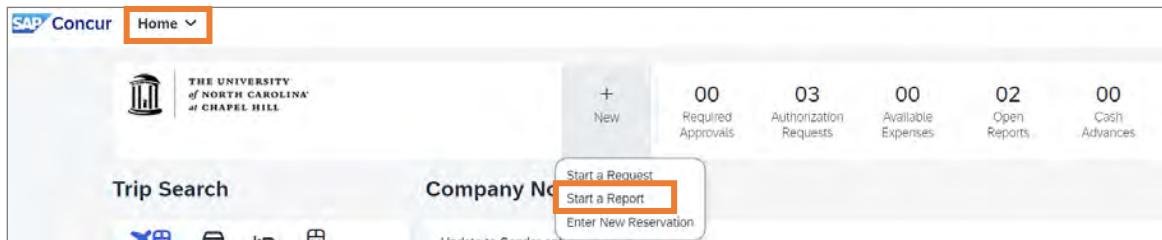
12. Creating Expense Reports

Expense Reports are used to verify allowable transactions and expenses related to your travel or business entertainment expenses. In addition, it is used to reconcile T&E Card transactions, generate reimbursements, and charge correct chartfield strings.

Creating a New Expense Report without a Travel Request

Follow these steps to create a new expense report without a travel request:

1. From the Concur home page complete the following:
 - a. On the Concur home page, place your mouse pointer over **New** on the Quick Task Bar.
 - b. Click the **Start a Report** link.
or
Click the **Home** drop-down menu and select **Expense**.



Result: The Manage Expenses page will appear.

2. On the Create a New Report page, complete all required (noted by red asterisks) and optional fields as needed.

Note: For non-overnight travel, it is considered best practice to include the business purpose of the expense report for the Report Name. For example (July, 2020 Mileage).

- Click the **Create Report** button.

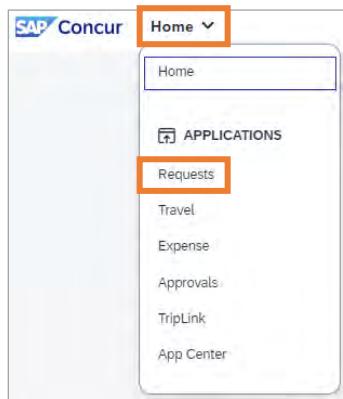
The screenshot shows the 'Create New Report' dialog box. It includes fields for Policy (UNC-General Expense Policy), Report Name, Report/Trip Purpose (None Selected), Report/Trip Start Date (MM/DD/YYYY), Report/Trip End Date (MM/DD/YYYY), Traveler Type (None Selected), Trip Type (None Selected), Is this report/trip federally funded? (None Selected), Business Unit, Project ID, Dept ID, Fund, Source, and PC Business Unit/PC Activity ID. The 'Create Report' button at the bottom right is highlighted with a red box.

- Then continue to follow the steps noted in the [Adding Expenses to an Expense Report](#) chapter.

Creating a New Expense Report from a Travel Request

You can create an expense report from an approved travel request. Follow these steps to create a new expense report from a travel request:

- Open the Active Requests page by clicking on the Home drop-down menu and selecting **Requests**.



- Select the Travel Request you want to create an expense report for.

The screenshot shows the 'Manage Requests' interface. There are two entries in the 'Request Library': 'USA Conference' (Not Submitted) and 'MINT Conference' (Approved). The 'MINT Conference' entry is highlighted with an orange border. At the top right, there are buttons for 'View Active Requests' and 'Create New Request'.

- Click the **Create Expense Report** button.

The screenshot shows the report details for the 'MINT Conference' travel request. It includes sections for 'REPORTS: 1', 'EXPECTED EXPENSES', and a table of expense items. At the top right, there is a 'More Actions' dropdown and a prominent blue 'Create Expense Report' button, which is highlighted with an orange border.

Result: All Report Details of the approved Travel Request will populate on the Expense Report.

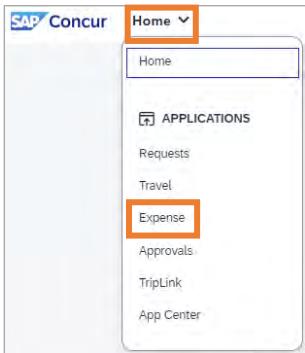
The screenshot shows the expense report for the 'MINT Conference' travel request. The report total is '\$0.00'. The 'REQUEST' section shows it is 'Approved' with a total amount of '\$470.36'. The 'EXPENSES' section is titled 'No Expenses' and contains the message 'Add expenses to this report to submit for reimbursement.' There are buttons for 'Delete Report' and 'Submit Report' at the top right.

- Then continue to follow the steps noted in the [Adding Expenses to an Expense Report](#) chapter.

Copying an Expense Report

You can copy an entire expense report to create a new expense report. Follow these steps to copy an expense report as a new expense report:

1. Open the Manage Expenses page by clicking on the Home Drop-down menu and selecting **Expense**.



Result: The Manage Expenses page will appear.

2. Click on the expense report you want to copy.

A screenshot of the "Manage Expenses" page. At the top left is the title "Manage Expenses". To the right is a "Report Library" section. It shows two expense reports:

- The first report is for "MINT Conference" dated 04/01/2024. It shows a total of \$0.00 and is labeled "Not Submitted".
- The second report is also for "MINT Conference" dated 04/01/2024. It shows a total of \$170.76 and is labeled "Submitted". This report is highlighted with a red box.

On the right side of the page, there is a "Create New Report" button and a "View: Active Reports" dropdown menu.

Result: The selected expense report will appear.

3. Click the **Copy Report** button.

A screenshot of the expense report details page for the "MINT Conference" report. At the top left is the title "MINT Conference \$170.76". To the right are "Copy Report" and "Recall Report" buttons, with "Copy Report" highlighted with a red box. Below this is a "REQUEST" section showing "Approved: \$170.76" and "Remaining: \$170.76".

Submitted & Pending Supervisor Approval | Report Number: T95UBC

Report Details ▾ Print/Share ▾ Manage Receipts ▾

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
⚠️	Out of Pocket	Hotel	Best Western International Charlotte, North Carolina	01/15/2024	\$170.76 Itemized	\$170.76

Result: The Copy Report popup window will appear.

4. Enter a new name for the report in the **New Report Name** field.
5. Enter the starting date for the report in the **Starting date for copied expenses** field.
6. Click the **Create New Report** button.

New Report Name *
Copy: MINT Conference

Starting date for copied expenses. (Previous Date 01/15/2024) *
04/01/2024

Create New Report

Result: The new expense report has been created. It can then be edited, saved, or submitted.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Out of Pocket	Hotel Best Western International Charlotte, North Carolina	04/01/2024	\$170.76 Itemized	...
\$170.76							

13. Adding Expenses to an Expense Report

Adding Available Expense Transactions

On the Concur home page, you can view a list of unassigned T&E card transactions, Airfare Direct Bill transactions, and E-Receipts in the Available Expenses section. Also, for Available Expenses, some of the expense types may automatically populate based on the merchant or transaction type. These transactions must be reviewed and edited as necessary to ensure the correct account code is assigned and the correct expense form is completed.

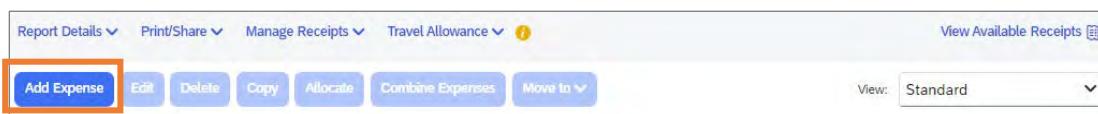
Note: The payment type for T&E Card transactions and Airfare Direct Bill transactions will automatically be assigned and cannot be changed.

When using your T&E Card for purchases in a foreign currency, Bank of America will assess an International Transaction Fee. These fees will appear as separate transactions under Available Expenses and should be included on the same Expense report as the T&E Card expenses which they are related to. No receipt is required when reconciling the expense.

From an open expense report

Follow these steps to add available transactions within an open report:

1. Click the **Add Expense** button.



- From the Available Expenses tab, select the check box(es) for the appropriate expenses you want to assign to the current expense report.

Payment Type	Expense Type	Vendor Details	Date	Amount
	Courtyard	02/23/2018	\$605.41	
	Avis	02/23/2018	\$527.82	
	Courtyard	01/12/2018	\$1,388.93	
	Avis	01/12/2018	\$580.78	
American Express	Taxi	Uber	11/17/2017	\$24.00
American Express	Office Supplies	Staples	11/16/2017	\$68.23
Out of Pocket	Hotel	Wyndham Hotels	08/02/2017	\$682.00

- Click the **Add to Report** button.

From the Available Expenses section

Expenses listed in the Available Expenses section can be added to an existing expense report or used to create a new expense report. Follow these steps to assign transactions to a report from the Available Expenses section:

- Click the **Available Expenses** tile in the My Task section of the Home page.

03/23 VENETIAN/PALAZZO FRT...	\$1,073.69
03/23 UBER TRIP	\$6.18
03/23 UBER TRIP	\$33.99
03/22 Lyft	\$19.65
03/22 The VenetianR	\$1,373.69

- From the Available Expenses section (you might need to scroll down) mark the checkbox next to the Available Expense(s) you want to add to an existing expense report or new report.
- Click the **Move to** button.

- Select the Expense Report you want to add the Available Expense(s) to or select New Report to create a new report.

The screenshot shows a table of expense transactions. One transaction has a context menu open with options like 'New Report' and 'AA UATP Card Corrections'. The table includes columns for Receipt, Payment Type, Expense Type, Vendor Details, Date, and Amount.

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	
University Travel Card	AA UATP Card Corrections	Undefined	UBER TRIP	03/23/2024	\$6.18	
University Travel Card	Accountable Plan Test	Undefined	UBER TRIP	03/23/2024	\$33.99	
University Travel Card	Concur Fusion 2024	Corporate Card, Expenselit	Hotel	VENETIAN/PALAZZO FRT DES Las Vegas, Nevada	03/23/2024	\$1,073.69
University Travel Card		Corporate Card, E-Receipt	Ground Transportation	Lyft	03/22/2024	\$19.65

Result: Depending on the action you select; one of two results will occur:

- If you selected an existing report, the report opens, and the Available Expense transaction is added to the report.
- If you selected **New Report**, the Create New Report page appears. Enter the report information as usual.

Adding Out-of-Pocket Expenses

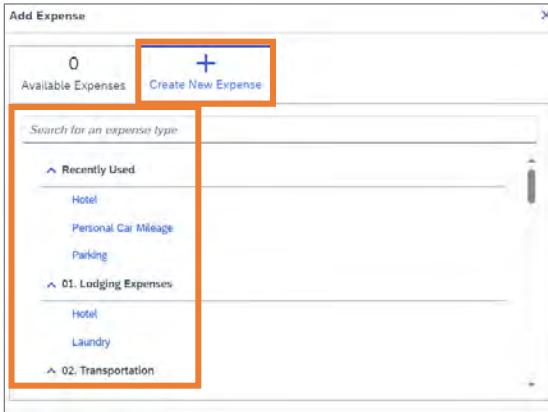
Follow these steps to add out-of-pocket expenses to a report:

- From the open report, click the **Add Expense** button.

The screenshot shows the top toolbar of a report. The 'Add Expense' button is highlighted with an orange box. Other buttons include Edit, Delete, Copy, Allocate, Combine Expenses, and Move To.

- Click the **Create New Expense** tab.

3. Search for or select the appropriate expense type from the list.



Result: The New Expense page appears displaying the required and optional fields for the selected expense type. The Expense Type field, Traveler Type, Trip Type, and Report/Trip Purpose are all automatically populated on the New Expense page.

4. Complete the required (noted by red asterisks) and optional fields.
5. Select **Out of Pocket**, from the Payment Type dropdown menu.
6. Click the **Add Receipt Image** icon to upload and/or attach the receipt.

Note: If the expense requires itemization, click the Itemization tab.

7. Click the **Save Expense** button.

Adding P-Card, Purchase Order, Voucher Paid, and Third-Party Expenses

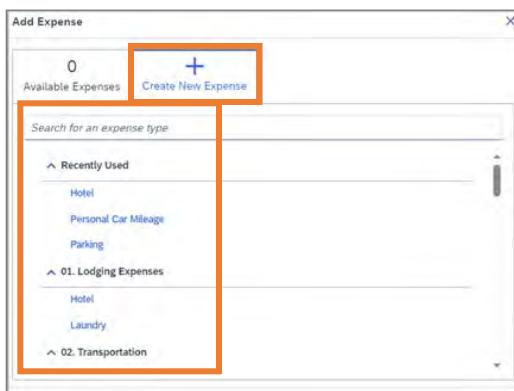
Transactions paid by P-Card, Purchase Order, Voucher, or by a Third-Party are not required for Expense Report processing. However, it is a recommended best-practice to include these transactions so that your Expense Report provides a complete view of all costs associated with a trip.

Follow these steps to add expenses paid by P-Card, Purchase Order, Voucher, or a Third-Party to a report:

1. From the open report, click the **Add Expense** button.



2. Click the **Create New Expense** tab.
3. Search for or select the appropriate expense type from the list.



Result: The New Expense page appears displaying the required and optional fields for the selected expense type.

4. Complete the required (noted by red asterisks) and optional fields.
5. Select one of the following, from the Payment Type dropdown menu.
 - **Paid by 3rd Party**
 - **University paid by PCard**
 - **University paid by Purchase Order**
 - **University paid by Voucher**

6. Click the **Add Receipt Image** icon to upload and attach the receipt.

The screenshot shows the 'New Expense' form interface. On the left, the 'Details' tab is active, displaying fields for Expense Type (Parking), Transaction Date, Trip Type (In-State), Additional Information, City of Purchase, and Amount. A note at the bottom of this section says 'PLEASE SELECT PAYMENT TYPE'. On the right, the 'Receipt' tab is open, showing a large input field with an 'Add Receipt' button and instructions: 'Click to upload or drag and drop file to upload a new receipt. Valid file types for upload are jpg, jpeg, pdf, iff, iff, iff'. Below this is a note: '1MB limit per file'.

Note: If the expense requires itemization, click the Itemization tab.

7. Click the **Save Expense** button.

Adding Personal Meal Expenses for Reimbursement

All personal meals must be paid for out-of-pocket by the traveler. University travelers are only eligible for reimbursement of meals when they make an overnight trip. Partial day reimbursement is possible when the partial day is the day of departure or return for a trip, but it must be in conjunction with an overnight trip taken. No excess reimbursement will be allowed for meals unless there is a documented exception in place, or the meals were for out-of-country travel.

Adding a Daily Allowance Expense (Federal per diem rates)

When engaging in overnight travel, the Concur system can add the appropriate federal meal per diem rates to your report based on the destination as well as departure and return dates of travel.

- **International** - When traveling Outside of the Contiguous United States (OCONUS), Concur will utilize the rates set by the Department of State. These rates can be found on the US Department of State's [Foreign Per Diem Rates](#) webpage.
- **Domestic** - When traveling within the Continental United States (CONUS), Concur will utilize the rates set by the US General Services Administration (GSA). These rates can be found on the US GSA's [Per Diem Rates](#) webpage.
- **Other** - When traveling to Hawaii, Alaska, or US Territories and Possessions, Concur will utilize the rates set by the Department of Defense. These rates can be found on the [Department of Defense Travel Management](#) office webpage.

The maximum allowable amount will be calculated for the Daily Allowance based on the location and dates of travel. However, the first and last day of travel of the Daily Allowance will be calculated at 75% of the day's total (including incidentals).

Follow these steps to add a daily allowance expense:

1. Open an expense report or create a new expense report.
2. Click the **Travel Allowance** dropdown link.
3. Click **Manage Travel Allowance** from the dropdown menu.



Result: The Available Itineraries wizard appears.

4. Select an itinerary from the Available Itineraries section.
5. Click the **Assign** button.

Note: If no itineraries exist, click the **Previous** button to create a new itinerary and follow the steps below to create a new itinerary. Then continue to step 6.

The screenshot shows a software interface for managing travel allowances. At the top, there are three tabs: 'Create New Itinerary' (selected), 'Available Itineraries' (highlighted with a red box), and 'Expenses & Adjustments'. Below the tabs, there's a section titled 'Assigned Itineraries' with 'Edit' and 'Delete' buttons. The main area displays search fields for 'Departure City', 'Date and Time', 'Arrival City', 'Date and Time', and 'Arrival Rate Location'. A message 'No Assigned Itineraries Found.' is displayed. In the center, there's a 'Available Itineraries' section with a dropdown menu set to 'Current Itineraries'. This section includes buttons for 'Add Step', 'Delete Stop', and 'Import Itinerary'. A message 'No Available Itineraries Found.' is shown here as well. At the bottom right, there are 'Next >>' and 'Cancel' buttons.

Follow these steps to create a new itinerary:

- Enter the following in the designated and required (as noted by red bars) fields of the New Itinerary Stop section:
 - departure city
 - departure date and time
 - arrival city
 - arrival date and time
- Click the **Save** button.

The screenshot shows the 'Itinerary Info' section where 'Copy: MINT Conference' is selected. Below it, there are buttons for 'Add Step', 'Delete Stop', and 'Import Itinerary'. The 'New Itinerary Stop' section is highlighted with a red box. It contains fields for 'Departure City' (with a red bar under 'City'), 'Date' (with a red bar under 'Date'), 'Time' (with a red bar under 'Time'), 'Arrival City' (with a red bar under 'City'), 'Date' (with a red bar under 'Date'), and 'Time' (with a red bar under 'Time'). At the bottom right of the 'New Itinerary Stop' box is a 'Save' button. The overall interface includes a 'Next >>' button at the bottom right.

Result: The stop will be added to the list on the screen and the New Itinerary Stop section will be refreshed to add another stop. The departure and arrival cities will automatically be populated but reversed from what was previously entered.

- c. Enter the following in the designated fields of the New Itinerary Stop section:
 - departure date and time,
 - arrival city (if this needs to be updated to a different destination),
 - arrival date and time.
- d. Click the **Save** button.
- e. Click the **Next** button.

The screenshot shows a software interface for managing travel allowances. At the top, there are tabs for 'Edit Itinerary', 'Available Itineraries', and 'Expenses & Adjustments'. Below this is a section titled 'Itinerary Info' with fields for 'Itinerary Name' (set to 'Copy: MINT Conference') and 'Selection' (set to 'USG0A2'). A large central area displays an itinerary entry for a trip from 'Raleigh, North Carolina' on '04/10/2024 08:00 AM' to 'Charlotte, North Carolina' on '04/10/2024 10:15 AM'. To the right of this, a smaller box titled 'New Itinerary Stop' is shown, also for a trip from 'Charlotte, North Carolina' to 'Raleigh, North Carolina'. This 'New Itinerary Stop' box is highlighted with a thick orange border. At the bottom right of the main screen, there is a blue 'Save' button. Along the bottom edge of the window, there are buttons for 'Go to Simple Day Itineraries', 'Next >>', and 'Cancel'.

Note: Itineraries may contain multiple destinations. Repeat steps 6 to 8 as necessary to list the complete itinerary and ensure the proper per diem rates are being provided based on the destination.

6. Click the **Next** button.

- Once your itineraries appear mark the check boxes of when a meal was provided for each day.

Note: If all meals are provided, the calculation will still reimburse the appropriate incidental rate for that day. However, if you wish to exclude an entire day, including incidentals, check the box to the far left under "Exclude". If no meals were provided do not mark any of the checkboxes.

Result: The allowance will automatically calculate the per diem for reimbursement.

Note: Daily Allowance will automatically calculate the first and last day of travel at 75% of the day's total allowance (including incidentals) per Federal guidelines.

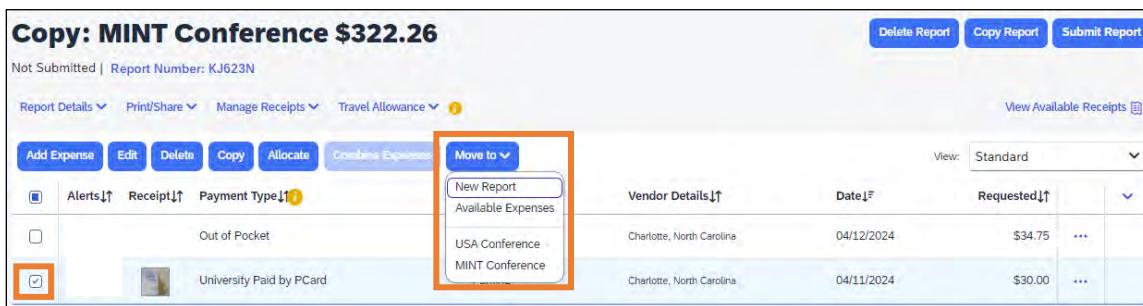
- Click the **Create Expenses** button.

Result: The daily allowance expense(s) will be added to the expense report.

Moving Expenses from One Report to Another or Back to Available Expenses

The ability to move an expense from one report to another is helpful when an expense transaction has been assigned to the wrong expense report. Follow these steps to move an expense to another expense report:

1. Open a current Expense Report that contains the transaction you want to move.
2. Select the checkbox next to the transaction(s) you want to move.
Note: Select the uppermost check box to select all transactions.
3. Click the **Move to** button.
4. Select the name of the appropriate report or select a **New Report** from the dropdown.



The screenshot shows a Concur Expense Report page for "MINT Conference \$322.26". The report is not submitted, with a report number KJ623N. The "Move to" dropdown menu is open, showing options: "New Report", "Available Expenses", "USA Conference", and "MINT Conference". The "MINT Conference" option is highlighted with a red box. The main table lists two transactions: "Out of Pocket" and "University Paid by PCard", both with checkboxes checked. The "Move to" dropdown is also highlighted with a red box.

Result: Depending on the action you select; one of two results will occur:

- If you select an existing report, the report opens, and the selected transaction(s) are moved to the report.
- If you select **New Report**, the Create New Report page appears. Enter the report information to create the new report.

Combining Expenses

Transactions listed in the Available Expense section can be combined to reduce duplicate expenses. This feature is helpful when you have a combination of T&E Card transactions, E-Receipts, and expenses created using the Mobile app. Duplicate expenses must be combined to prevent duplication and resolve seemingly outstanding expenses. Follow these steps to combine expenses:

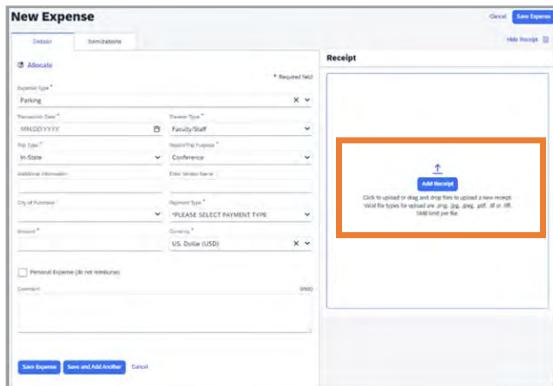
1. From the Concur homepage, click the **Available Expenses** tile.
2. In the Available Expenses section, mark the checkbox beside each expense that needs to be combined.
3. Click the **Combine Expenses** button.

Attaching Receipts

Most expenses will require a receipt. The Concur system will alert you when a required receipt is missing and when a Missing Receipt Declaration is not allowed. You can review [Procedure 1501.7 on Travel Expenses and Reimbursements](#) to learn more.

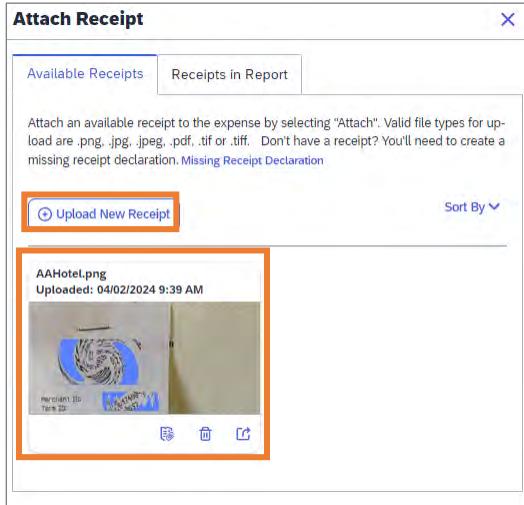
Receipts can be added when creating a new expense or can be added from the main report page by clicking the receipt “+” icon on the expense line. The steps noted in this section provide instructions on how to attach a receipt to an expense. Follow these steps to attach a receipt image to an expense:

1. Select an expense entry and open it in the Details view.
2. Click **Attach Receipt Image** tile.

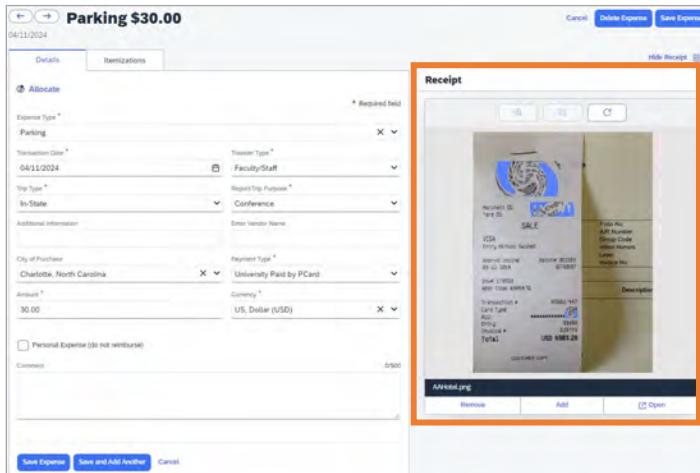


3. Click **Upload New Receipt** or the **Attach** link on a receipt that has been uploaded previously.

Note: If selecting the **Upload Receipt Image** tile, follow the prompts on the screen to select the receipt to upload. Also, the system accepts file attachments in PDF, JPG, HTML, TIF or TIFF formats.



Result: The receipt image is attached to the expense entry and displays on the right side of the screen.



Note: You can remove receipts or add additional receipt images. Only one file may be attached initially but you may then use the Add feature to add additional files.

Missing Receipt Declaration

A Missing Receipt Declaration should be completed when a receipt is lost or misplaced, and the expense requires a receipt. In these instances, you can digitally sign a

declaration that you can submit, instead of the actual imaged receipts. Using a receipt declaration allows you to submit your expense report in a timely manner and comply with [Procedure 1501.7 on Travel Expenses and Reimbursements](#) on receipt submittal.

Important: A delegate cannot submit a Missing Receipt Declaration on your behalf.

Also, Missing Receipt Declarations are not allowable for the following expense types:

- Lodging
- Airfare
- Car Rental
- Conference Registration

Submitting a Missing Receipt Declaration

Follow these steps to submit a missing receipt declaration:

1. Open the expense report that has the expense missing a receipt.
2. Click the **Manage Receipts** link dropdown arrow.
3. Select **Missing Receipt Declaration**.

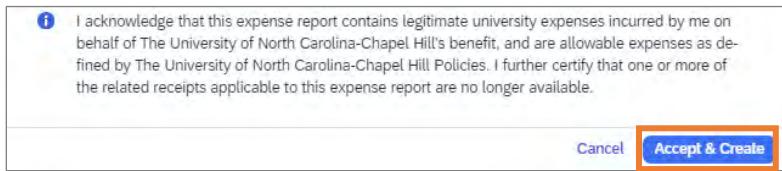
The screenshot shows a Concur expense report titled "Copy: MINT Conference \$322.26". At the top, there are buttons for "Delete Report", "Copy Report", and "Submit Report". Below this is a navigation bar with "Report Details", "Print/Share", "Manage Receipts" (which is highlighted with an orange box), "Travel Allowance", and a help icon. Under "Manage Receipts", there are options: "Manage Attachments", "View Receipts in New Window", "Expense Type", "Vendor Details", "Date", "Requested", and a "View Available Receipts" button. The main area displays expense entries for "Out of Pocket" and "University Paid by PCard". The "Missing Receipt Declaration" option is also listed under "Manage Receipts".

Result: A Create Receipt Declaration pop-up window will appear.

4. Mark the checkbox for each eligible expense entry that requires the declaration.

The pop-up window is titled "Create Receipt Declaration". It contains a note about IRS rules and regulations regarding documentation for reimbursable expenses. Below this, it says "To create a Missing Receipt Declaration, select the expenses below that require a receipt." A table lists expenses: "Hotel" (Best Western International, 04/01/2024, \$170.76). The "Hotel" row has a checked checkbox in the first column. At the bottom, there is a statement of acknowledgement and two buttons: "Cancel" and "Accept & Create".

5. Read through the declaration, scrolling down to continue.
6. Click the **Accept and Create** button.



Result: The missing receipt declaration is attached, and an icon displays on the line-item entry. If you later find the receipt (before submitting the report), you can detach the receipt declaration, and then attach the actual receipt image.

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾					View Available Receipts	
Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Moveto ▾
Expense Type	Vendor Details	Date	Requested	View: Standard		
<input type="checkbox"/> Alerts	<input type="checkbox"/> Receipt	<input type="checkbox"/> Payment Type	University Paid by PCard	Hotel	Best Western International, Charlotte, North Carolina	\$170.76 Itemized
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	University Paid by PCard	Hotel	Best Western International, Cherokee, North Carolina	\$170.76
						\$322.26

Deleting a Missing Receipt Declaration

Follow these steps to delete a missing receipt declaration from an expense:

1. Open the expense report that has a Missing Receipt Declaration.
2. Click the **Declaration** icon.

Copy: MINT Conference \$322.26					Delete Report Copy Report Submit Report	
Not Submitted Report Number: KJ623N					View Available Receipts	
Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Moveto ▾
<input type="checkbox"/> Alerts	<input type="checkbox"/> Receipt	<input type="checkbox"/> Payment Type	Out of Pocket	Daily Allowance	Charlotte, North Carolina	\$34.75
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	University Paid by PCard	Parking	Charlotte, North Carolina	\$30.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Out of Pocket	Daily Allowance	Charlotte, North Carolina	\$52.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Out of Pocket	Daily Allowance	Charlotte, North Carolina	\$34.75
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	University Paid by PCard	Hotel	Best Western International, Charlotte, North Carolina	\$170.76 Itemized
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	University Paid by PCard	Hotel	Best Western International, Charlotte, North Carolina	\$170.76
						\$322.26

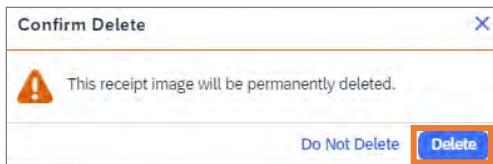
Result: A pop-up window will appear.

3. Click the **Delete** button.



Result: A confirmation pop-up message will appear.

4. Click the **Delete** button.



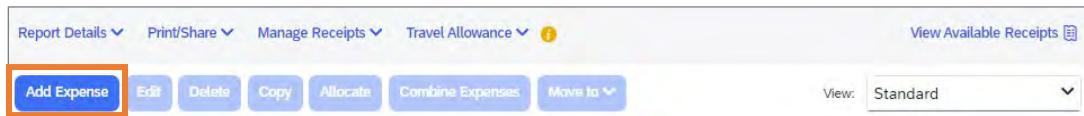
Result: The receipt declaration is deleted from the expense line item. You can now add the appropriate receipt to the expense.

Adding Personal Car Mileage

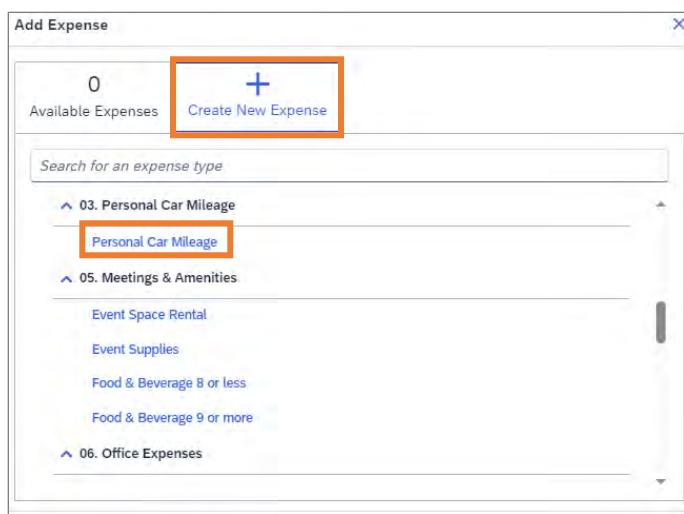
If a personal vehicle has been used for travel, the traveler can request reimbursement based on the rates established by the IRS and the University.

Follow these steps to enter personal car mileage as an expense:

1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button.



3. Click the **Create New Expense** tab.
4. Select **Personal Car Mileage** from the expense type list.



Note: You must have registered your personal vehicle. If you have not done so you will be required to complete the steps to register your personal vehicle.

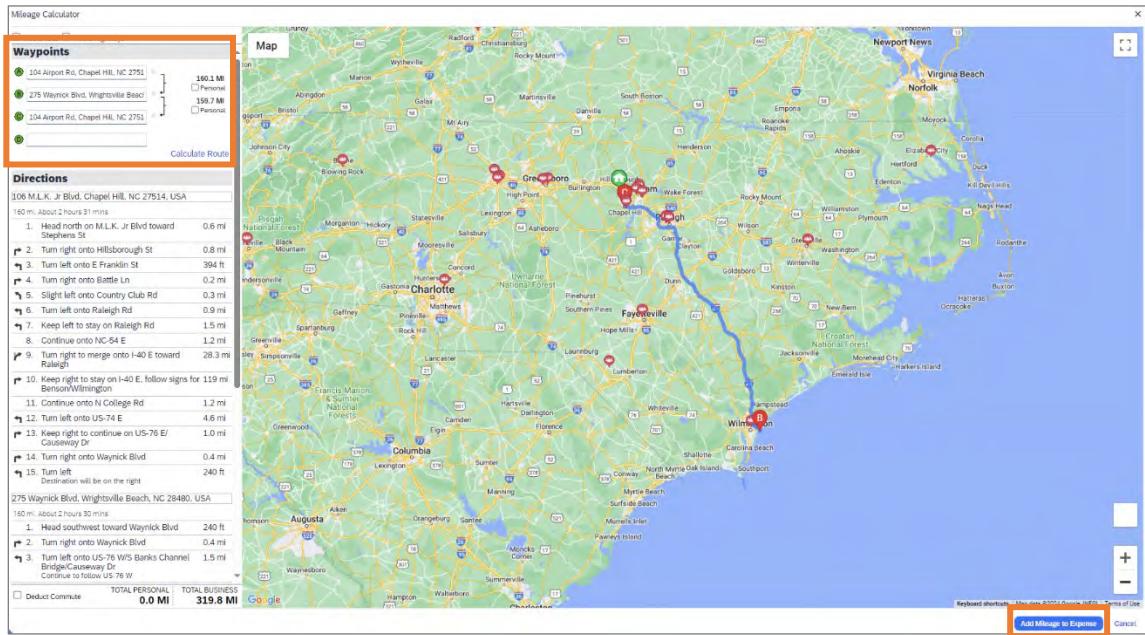
Result: The Mileage Calculator map will appear.

5. Enter your destinations in the Waypoints field.

Result: The system will automatically calculate the mileage, leveraging Google Maps.

Note: If the travel is round trip click the Make Round Trip link to add the mileage and final destination automatically.

6. Click the **Add Mileage to Expense** button.



Result: The New Expense page will appear.

7. Complete all the required (noted by red asterisks) and necessary optional fields.

The screenshot shows the 'New Expense' page. At the top, there are tabs for 'Details' and 'Itemizations', and buttons for 'Cancel', 'Save Expense', and 'Show Receipt'. The main area is titled 'Mileage Calculator *'. It includes fields for 'Expense Type *' (Personal Car Mileage), 'Transaction Date *' (MM/DD/YYYY), 'Traveler Type *' (Faculty/Staff), 'Trip Type *' (In-State), 'Report/Trip Purpose *' (Other), 'From Location' (104 Airport Rd, Chapel Hill, NC 27516, USA), 'To Location' (275 Waynick Blvd, Wrightsville Beach, NC 28480, USA), 'Payment Type' (Out of Pocket), 'Vehicle ID *' (Mileage <= 350 Miles), 'Distance to Date' (0), 'Distance *' (325), 'Number of Passengers *' (0), 'Amount' (US, Dollar (USD)), 'Currency' (US, Dollar (USD)), and 'Reimbursement Rates'. A comment field is also present. The entire 'Mileage Calculator' section is highlighted with a large orange border.

8. Ensure the Vehicle ID selected is correct for the number of miles driven.

- Mileage \leq 350 miles if round-trip mileage is equal to or less than 350 miles.
- Mileage $>$ 350 miles if round-trip mileage is greater than 350 miles.

Note: round-trip mileage which exceeds 350 miles must be entered as one, round-trip expense and not two, one-way expenses in order for the reduced mileage rate to calculate correctly.

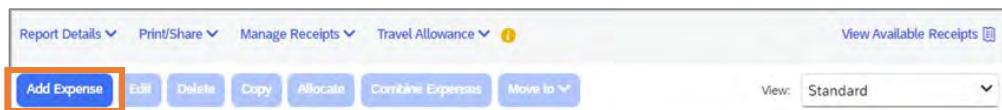
9. Click the **Save Expense** button.

Converting Foreign Currency Transactions

When your travel takes you to different countries, out-of-pocket expenses will need to be converted from the original foreign currency to US Dollars (USD). When you create a new out-of-pocket expense in a currency other than US Dollars, you may utilize the City of Purchase field to automatically populate the local foreign currency.

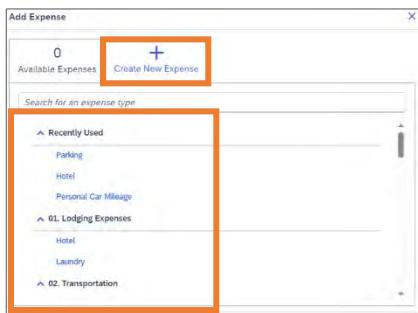
The exchange rate comes from the Oanda Corporation, a foreign exchange company. The system will look up the Average Daily Rate from Oanda based on the date and city of your expense, and automatically convert the transaction amount to USD. For T&E card transactions, Bank of America will convert transactions from the foreign currency to US Dollars. Follow these steps to convert out-of-pocket foreign currency transactions:

1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button.



3. Click the **Create New Expense** tab or **Available Expense** tab if you have enabled E-Receipts.

- Search for or select the appropriate expense type from the list.



- Enter all the appropriate information, including the Transaction Date and Amount.
- In the **City of Purchase** field, select the appropriate location from the dropdown menu.

The screenshot shows the 'New Expense' form. On the left, the 'Allocate' section is highlighted with a red box. It includes fields for 'Expense Type' (set to 'Parking'), 'Transaction Date' (MM/DD/YYYY), 'Trip Type' (In-State), 'Additional Information', 'City of Purchase' (highlighted with a red box), 'Payment Type' (dropdown menu), 'Amount', 'Currency' (set to 'US, Dollar (USD)'), and a 'Personal Expense (do not reimburse)' checkbox. On the right, there's a 'Receipt' panel with an 'Add Receipt' button and instructions for file upload.

Result: The Currency field will automatically update to the local currency of the City of Purchase selected. The Conversion Rate will populate from the Oanda database and the expense will be converted to US Dollars.

- Click the **Save Expense** button.

Result: The expense amount appears in both the foreign currency and in the standard reimbursement currency.

Managing Cash Advances

If a cash advance was received for a trip, it must be reconciled in full on the expense report for that trip. If you do not have enough out-of-pocket expenses to offset the cash

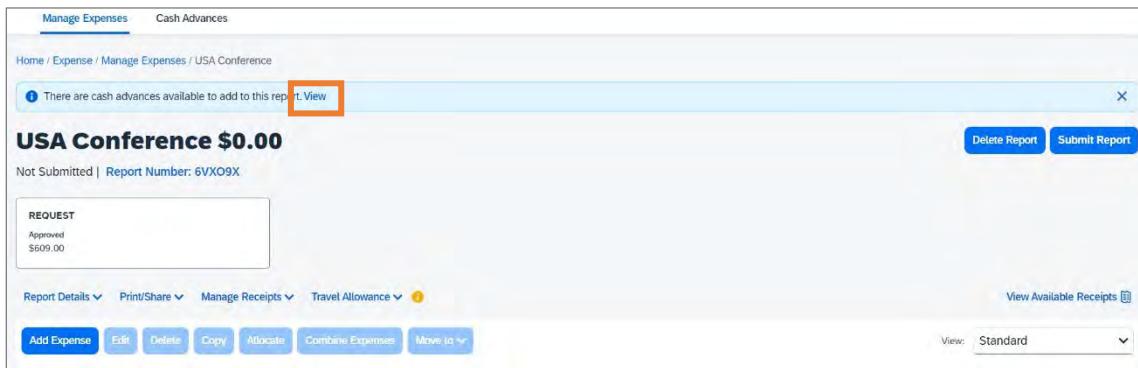
advance, any unused portion must be remitted back to the Travel Services Office prior to submitting your Expense Report. For additional information, please review [Procedure 1501.2 for Travel Advances](#).

To ensure that a cash advance is attached to your expense report, please follow the steps for [Creating a New Expense Report from a Travel Request](#).

Adding a Cash Advance to an Existing Expense Report

If the cash advance is not successfully added to your Expense Report, you will receive an alert that there are cash advances available to add to this report. Follow these steps to add a cash advance to an existing Expense Report:

1. Open the Expense Report that contains the alert.
2. Click the **View** link.



Result: The Cash Advances window will appear.

3. Click the **Add** button.



Result: The Available Cash Advances window will appear.

4. Check the box next to the cash advance you want to add to the report.
5. Click the **Add to Report** button.

Available Cash Advances						
	Cash Advance Name↑↓	Date Issued↑↓	Foreign Amount↑↓	Exchange Rate↑↓	Amount↑↓	Balance↑↓
<input type="radio"/>	MS Test TA	04/09/2021	\$1,000.00	\$1.00000000	\$1,000.00	\$1,000.00
<input checked="" type="radio"/>	USA Conference	04/08/2024	\$400.00	\$1.00000000	\$400.00	\$400.00
						Add To Report

Result: You will return to the Available Cash Advances window and the cash advance is added to the list.

6. Click the **Close** button.



Result: The Cash Advance has successfully been added to the Expense Report. Out-of-Pocket expenses may now be added by following the steps for [Adding Out-of-Pocket Expenses](#).

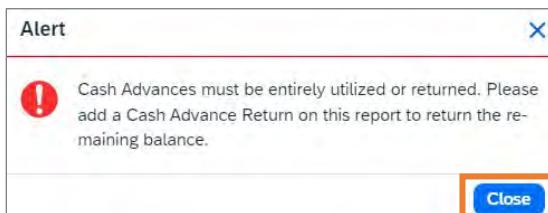
The screenshot shows the 'Manage Expenses' section under 'Cash Advances'. A report titled 'USA Conference \$0.00' is displayed. On the left, there's a 'REQUEST' box showing an approved amount of '\$600.00'. On the right, a 'CASH ADVANCE: 1' box is shown with an 'Amount' of '\$400.00' and a 'Remaining' balance of '\$400.00'. This 'CASH ADVANCE: 1' box is highlighted with a red border. At the top right, there are 'Delete Report' and 'Submit Report' buttons. Below the boxes are various report management buttons like 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A 'View Available Receipts' link is also present. The bottom navigation bar includes 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move To'. A dropdown menu for 'View' is set to 'Standard'.

Adding the Cash Advance Return Expense to an Expense Report

An Expense Report cannot be submitted which has a Remaining Cash Advance Balance. If you did not remit the unused portion of the Cash Advance back to the Travel Services Office, you must add a Cash Advance Return Expense to your report. This Expense will create a Payroll deduction for the remaining amount.

When submitting an Expense Report with a remaining Cash Advance, you will receive an alert that Cash Advances must be entirely utilized or returned. Follow these steps to add a Cash Advance Return Expense:

1. Click the **Close** button to close the alert or open the Expense Report that contains the alert.



- Click the Add Expense button.

The screenshot shows a report titled "USA Conference \$491.00". At the top right are buttons for "Delete Report", "Copy Report", and "Submit Report". Below the title are sections for "REQUEST" (Approved \$609.00) and "CASH ADVANCE: 1" (Amount \$400.00, Remaining \$195.00). A navigation bar includes "Report Details", "Print/Share", "Manage Receipts", "Travel Allowance", and "View Available Receipts". Below this is a toolbar with buttons for "Add Expense" (highlighted with a red box), "Edit", "Delete", "Copy", "Allocate", "Combine Expenses", and "Move to". A table lists expenses: Paid by 3rd Party (Airfare, American Airlines, 04/08/2024, \$286.00) and Out of Pocket (Hotel, Hyatt Hotels Wilmington, North Carolina, 02/29/2024, \$205.00, Itemized). The total requested amount is \$491.00.

Result: The Add Expense pop-up window will appear.

- Select **Cash Advance Return** from the list of expenses.

The screenshot shows the "Add Expense" pop-up window. It has a header with "Add Expense" and a close button. Below it is a section with "0 Available Expenses" and a "Create New Expense" button. A search bar says "Search for an expense type". A list of expense types is shown, including "Marketing/Promotional Costs", "Miscellaneous", "Non Reimbursable/Personal Expense", "Professional Subscriptions/Dues", "Tips/Gratuities", and "Tuition/Training Reimbursement". Under "12. Cash Advance", the "Cash Advance Return" option is highlighted with a red box.

Result: You will be prompted to create a new expense.

4. In the Date field, enter the last day of travel.
5. In the Amount field, enter the remaining balance of the Cash Advance.
6. Click the **Save Expense** button.

New Expense

Details Itemizations

Allocate

Expense Type *
Cash Advance Return

Date *
04/08/2024

Description:

Amount *
195.00

Currency *
US, Dollar (USD)

Save Expense Save and Add Another Cancel

Result: The Cash Advance Return has been added to the Expense Report and the Cash Advance remaining balance is \$0.

USA Conference \$491.00

Not Submitted | Report Number: 6VXOBX

REQUEST
Approved
\$609.00

CASH ADVANCE: 1
Amount: \$400.00 Remaining: \$0.00

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾ View Available Receipts ▾

Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Move to	View: Standard
<input type="checkbox"/>	Alerts ↑	Receipts ↑	Payment Type! ⚠	Expense Type! ⚠	Vendor Details! ⚠	Date! ⚠	Amount! ⚠
<input type="checkbox"/>	⚠		Cash Advance Return	Cash Advance Return	American Airlines	04/08/2024	\$195.00
<input type="checkbox"/>			Paid by 3rd Party	Airfare	American Airlines	04/08/2024	\$286.00
<input type="checkbox"/>			Out of Pocket	Hotel	Hyatt Hotels Wilmington, North Carolina	02/29/2024	\$205.00 Itemized
							\$686.00
							\$491.00

Allocating Expenses

As you create an expense report, you can allocate expenses to different projects or departments. You can allocate one expense, multiple expenses, or an entire expense report as needed.

Note: Allocations may adjust the approval workflow of the report, depending on the chartfield strings used.

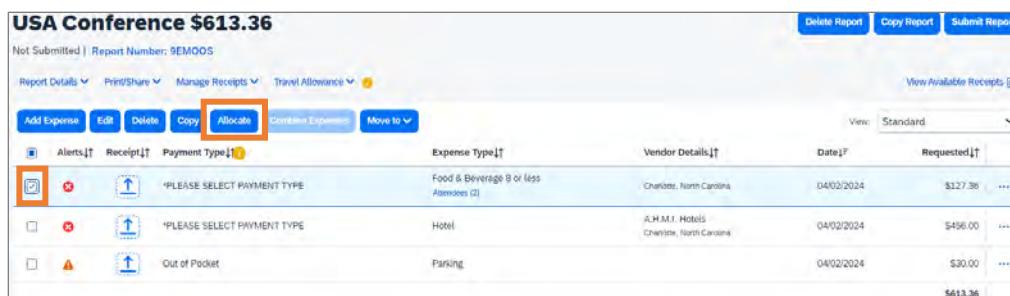
Allocating an Expense

Follow these steps to allocate expenses on an expense report:

1. Complete one of the following set of steps to get started:

Allocating an Existing Expense

- a. Open a current Expense Report.
- b. Select the checkbox for the expense(s) you want to allocate.
- c. Click the **Allocate** button.



USA Conference \$613.36						
Not Submitted Report Number: 9EM005						
Report Details		Print/Share		Manage Receipts		Travel Allowance
Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Move to
<input checked="" type="checkbox"/>	Alerts	Receipts	Payment Type	*PLEASE SELECT PAYMENT TYPE	Expense Type	Vendor Details
<input checked="" type="checkbox"/>				Food & Beverage 8 or less Attendees (2)	Charlotte, North Carolina	04/02/2024 \$127.36 ...
<input type="checkbox"/>				*PLEASE SELECT PAYMENT TYPE	A.H.M.I. Hotels Charlotte, North Carolina	04/03/2024 \$496.00 ...
<input type="checkbox"/>				Out of Pocket	Parking	04/02/2024 \$30.00 ...
						\$613.36

Result: The Allocate pop-up window will appear and you may proceed to Step 2.

Allocating a New Expense

- a. Open a current Expense Report.
- b. Click the **Add Expense** button.
- c. Complete the required and necessary fields.

- d. Click the **Allocate** link.

The screenshot shows the 'New Expense' page. At the top, there are two tabs: 'Details' and 'Itemizations'. Below these are sections for 'Attendees (1)' and 'Allocate'. The 'Allocate' button is highlighted with a red box. A note below it says '* Required field'. Under 'Expense Type', there is a dropdown menu set to 'Food & Beverage 8 or less'.

Result: The Allocate pop-up window will appear.

2. Select the **Percent** or **Amount** tab.
3. Click the **Add** button.

The screenshot shows the 'Allocate' pop-up window. It displays an expense of \$30.00 assigned to one attendee. The 'Percent' tab is selected, showing an allocation of 100% for \$30.00. The 'Amount' tab is also visible. Below this, there is a section for 'Default Allocation' with a code 'UNCCH-215500'. At the bottom left, there are buttons for 'Add', 'Edit', 'Remove', and 'Save as Favorite', with 'Add' highlighted with a red box. On the right, there are buttons for 'Cancel' and 'Save'. In the center, there is a message: 'No Allocations' with a note: 'This expense is assigned to your default allocation shown above. Click the allocate button to allocate part or all of this expense differently.'

4. Enter the appropriate chartfield string information or select an allocation from your Favorite Allocations Tab.
5. Click the **Save** button.

The screenshot shows the 'Add Allocation' pop-up window. It has tabs for 'New Allocation' and 'Favorite Allocations', with 'New Allocation' selected. Below are fields for 'Business Unit' (required), 'Dept ID', 'Fund', and 'Source'. The 'Business Unit' field contains '(UNCCH) UNC Chapel Hill' and the 'Dept ID' field contains '(215500) SCE - Cont Imp Staff Dev Eng'. Both of these fields are highlighted with a red box. At the bottom right are 'Cancel' and 'Save' buttons, with 'Save' highlighted with a red box.

6. Modify the percent or amount for the allocation.

Allocating by Percent - Enter the Percent of what you want to allocate to the designated chartfield string.

The screenshot shows the 'Allocate' screen with the following details:

- Expense: 1 \$30.00 View Allocation Group
- Allocation Type: Percent
- Amount: \$30.00
- Allocated: \$30.00 (100%)
- Remaining: \$0.00 (0%)
- Code: UNCCCH-215500
- Percent %: 25
- Buttons: Add, Edit, Remove, Save as Favorite
- Filter: Business Unit, Dept ID, Fund, Source, Project ID, PC Business Unit, PC Activity ID, Program, Cost Code 1, Cost Code 2, Cost Code 3, Code
- Allocation Lines:

UNC Chapel Hill	SCE - Cont Imp Staff Dev Eng	75
-----------------	------------------------------	----

Note: The total percentage of the lines must equal 100 percent.

Allocating by Amount - Enter the Amount of what you want to allocate to the designated chartfield string.

The screenshot shows the 'Allocate' screen with the following details:

- Expense: 1 \$30.00 View Allocation Group
- Allocation Type: Amount
- Amount: \$30.00
- Allocated: \$30.00 (100%)
- Remaining: \$0.00
- Code: UNCCCH-215500
- Amount USD: \$0.00
- Buttons: Add, Edit, Remove, Save as Favorite
- Filter: Business Unit, Dept ID, Fund, Source, Project ID, PC Business Unit, PC Activity ID, Program, Cost Code 1, Cost Code 2, Cost Code 3, Code
- Allocation Lines:

UNC Chapel Hill	Office of the Chancellor	7.50
UNC Chapel Hill	SCE - Cont Imp Staff Dev Eng	22.50

Note: The total amounts of the line must equal the total amount of the expense(s).

7. Continue to click the **Add** button and follow the steps to add additional distribution lines for allocation until the amount equals the total amount of the expense(s) or the percent total is 100.

8. Click the **Save** button.

The screenshot shows the 'Allocate' dialog box for an expense item. The total amount is \$30.00, which is being allocated to three cost codes:

Cost Code	Amount
UNDDH 000100	7.50
UNDDH 011000	22.50
Total	\$30.00

At the bottom right of the dialog box, there is a blue 'Save' button with a white arrow icon, which is highlighted with a red box.

Result: The expense will display as Allocated on the expense report page.

The screenshot shows the expense report page for a 'USA Conference' with a total amount of \$486.00. The report details section includes buttons for 'Delete Report', 'Copy Report', and 'Submit Report'. Below this, the expense items are listed:

Action	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			*PLEASE SELECT PAYMENT TYPE	Hotel	A.H.M. Hotels Charlotte, North Carolina	04/02/2024	\$486.00
			Out of Pocket	Parking		04/02/2024	\$30.00
							Allocated
							\$486.00

The 'Allocated' status is highlighted with a red box in the last row of the table.

Reviewing Allocations

Follow these steps to review how expenses on a report have been allocated:

1. Click the **Report Details** dropdown link.
2. Click **Allocation Summary** from the dropdown.

The screenshot shows the 'Report Details' dropdown menu open, with the 'Allocation Summary' option highlighted and surrounded by a red box. The main report summary table is visible in the background.

Payment Type	Expense Type	Vendor Details	Date	Requested
Out of Pocket	Parking	A.H.M. Hotels Charlotte, North Carolina	04/02/2024	\$30.00 Allocated
				\$486.00

Result: The Allocation Summary pop-up window will appear showing details of the allocations.

The pop-up window displays the allocation details for the USA Conference report. It lists two entries: one for UNCCH-215500 (Hotel) and one for UNCCH-200100 (Parking). The total amount of \$486.00 is also shown.

Code	Amount
UNCCH-215500	\$478.50
UNCCH-200100	\$7.50
	\$486.00

Editing Allocations

Follow these steps to make changes to how an expense is allocated:

1. Click the **Allocated** link under the Requested column of the expense you want to edit.
2. Click the **View Allocation** link.

The screenshot shows the 'Allocation Summary' pop-up window. The 'Allocated' link in the table header is highlighted with a red box. Below the table, a 'View Allocation' button is also highlighted with a red box.

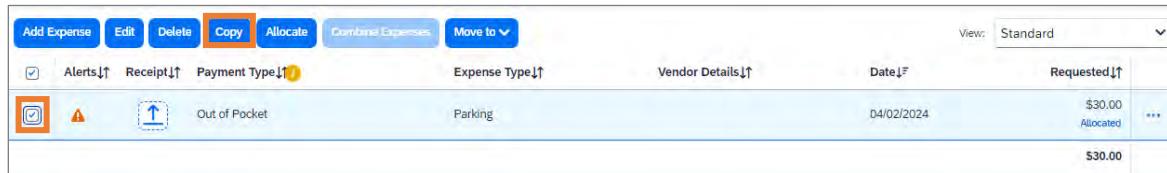
Allocated	
Total Allocated \$30.00	
Code	Percent
UNCCH-200100	25
UNCCH-215500	75

Result: The Allocate pop-up window will appear and you can make changes to the allocation.

Copying an Expense

You can copy an expense and then update the expense details to quickly enter a new expense. This is especially useful for recurring business expenses. Follow these steps to copy an expense:

1. Open the expense report that has the expense you want to copy.
2. Select the expense you want to copy by marking the checkbox.
3. Click the **Copy** button.



Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Move to	View: Standard
<input checked="" type="checkbox"/> Alerts	<input type="checkbox"/> Receipt	<input type="checkbox"/> Payment Type					
			Out of Pocket	Parking		04/02/2024	\$30.00 Allocated

Result: The new expense is added to the Expense list and the original expense date is advanced by one day. Also, all allocations, attendees, and expense-level comments from the original expense are copied to the new expense.

Note: Credit card information, e-receipts, mobile entry information, and travel segments from the original expense are not copied to the new expense. This type of information is generally associated with only one expense, so it is not copied to the new expense. If the Payment Type of the original expense is a T&E card, then the Payment Type of the new expense is editable using the dropdown list.

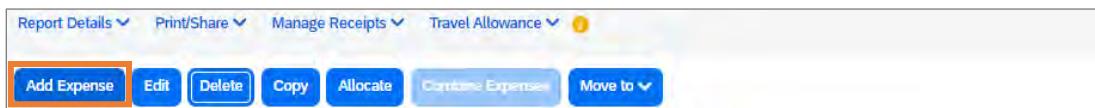
14. Itemizing Expenses and Attendees

You should itemize expenses to account for receipts that include both business and personal expenses or to ensure that each of your expenses is accounted for correctly. In addition, some transactions (business meals and lodging expenses) require receipts to be itemized. Review [Procedure 1501.7 on Travel Expenses and Reimbursements](#) to learn what expenses require receipt itemization.

Itemizing Nightly Lodging Expenses

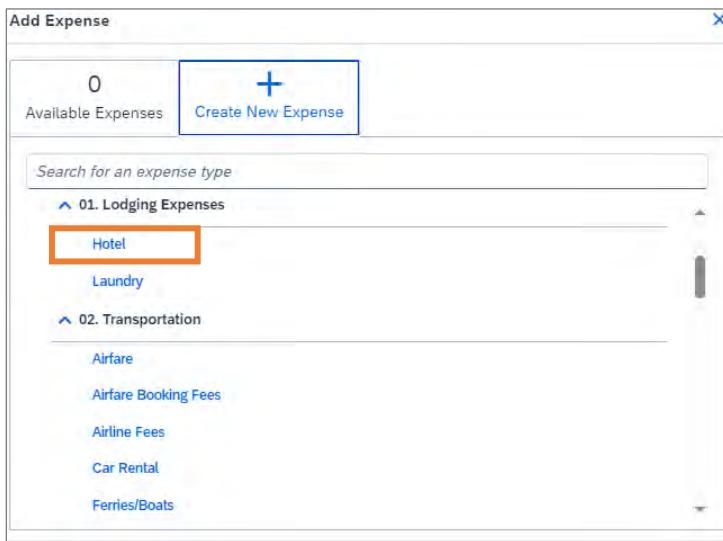
A hotel bill typically contains a variety of expenses including room fees, taxes, parking, valet, telephone charges, and/or personal items. You must itemize these expenses to correctly account for all expenditures. In the lodging expense form, Concur Expense calculates the number of nights based on the Check-in and Check-out Dates. Follow these steps to itemize nightly lodging expenses:

1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button.



3. Click the **Create New Expense** tab or **Available Expense** tab to access T&E Card Transactions and E-Receipts.

4. Select the **Hotel** expense type from Lodging Expenses listings.



5. Complete all the required (noted by red asterisks) and necessary optional fields.

Expense Type *	Hotel
Date Range *	MM/DD/YYYY - MM/DD/YYYY
Nights:	0
Transaction Date *	MM/DD/YYYY
Traveler Type *	In-State
Faculty/Staff	
Report/Trip Purpose *	Excess Lodging
Conference	None Selected
Additional Information	Search for Vendor
City of Purchase *	Payment Type *
Amount *	Currency *
US Dollar (USD)	
<input type="checkbox"/> Travel Allowance	
Comment	0/500

6. Click the **Itemization** tab.

Expense Type *	Hotel
Date Range *	MM/DD/YYYY - MM/DD/YYYY
Nights:	0
Transaction Date *	MM/DD/YYYY
Traveler Type *	In-State
Faculty/Staff	
Report/Trip Purpose *	Excess Lodging
Conference	None Selected
Additional Information	Search for Vendor
City of Purchase *	Payment Type *
Amount *	Currency *
US Dollar (USD)	
<input type="checkbox"/> Travel Allowance	
Comment	0/500

- Select the Hotel expense type from the Lodging Expenses listing.

Hotel \$456.00
04/03/2024 Allegro Resorts

Details	Itemizations
Amount: \$456.00	Itemized: \$0.00
Remaining: \$456.00	

New Itemization

Expense Type * Required field

Search for an expense type

Recently Used

- Hotel** Selected
- Food & Beverage \$ or less
- Parking
- Airfare
- Personal Car Mileage
- 01. Lodging Expenses
- Hotel Tax
- Laundry

- Complete all the required (noted by red asterisks) and necessary optional fields.

Note: If more than one rate was charged, click the **Not the Same** tab. You can also use Tax 2 or Tax 3 fields to enter additional daily taxes and fees like Resort Fees.

Hotel \$456.00
04/03/2024 Allegro Resorts

Details	Itemizations
Amount: \$456.00	Itemized: \$0.00
Remaining: \$456.00	

New Itemization

Expense Type * Required field

Hotel

Entry Type: Recurring Itemization 04/01/2024 - 04/03/2024 (Nights: 2)

Your hotel room rate was:

The Same Every Night Selected Not the Same ?

Room Rate (per night)* Room Tax (per night) Tax 2 (per night) Tax 3 (per night)

(Amounts in USD) Add Tax Fields

Save Itemization **Save and Add Another** **Cancel**

- Click the **Save Itemization** button.

Note: You will need to continue itemizing all the line item charges that appear on the folio/receipt using other expense types (i.e. laundry, personal expense, etc.) until the remaining balance is \$0.00.

Itemizing Business Meal Expenses

Business meals expenses must have an itemized receipt. Follow these steps to itemize business meal expenses:

1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button to create a new expense or select an expense listed.
3. Complete all the required (noted by red asterisks) and necessary optional fields.

The screenshot shows the 'New Expense' page. On the left, the 'Details' tab is active, displaying fields for Attendees (1), Expense Type (Food & Beverage \$ or less), Transaction Date (MM/DD/YYYY), Trip Type (In-State), Additional Information, City of Purchase (Charlotte, North Carolina), Amount, Currency (US, Dollar (USD)), and a checkbox for Personal Expense. On the right, the 'Receipt' panel is open, showing a large blue-bordered area for uploading a receipt, with instructions: 'Click to upload or drag files to upload a new receipt. Valid file types for upload are: png, jpg, jpeg, pdf, tif or tiff. SMB limit per file.'

4. Click the **Itemizations** tab.

The screenshot shows the 'New Expense' page with the 'Itemizations' tab selected. The rest of the page is identical to the previous screenshot, showing the 'Details' tab and the 'Receipt' panel.

5. Complete all the necessary fields for this expense.

Food & Beverage 8 or less \$127.36

04/02/2024

Itemizations

Amount: \$127.36 Itemized: \$0.00 Remaining: \$127.36

UNC-Meetings & Amenities

* Required field

Food & Non-Alcoholic Beverages	<input type="checkbox"/> Personal Expense (do not reimburse)
Alcoholic Beverages	<input type="checkbox"/> Personal Expense (do not reimburse)
Tips/Gratuities	<input type="checkbox"/> Personal Expense (do not reimburse)
Tax	<input type="checkbox"/> Personal Expense (do not reimburse)
Non Reimbursable/Personal Expense	<input type="checkbox"/> Personal Expense (do not reimburse)

(Amounts in USD)

Receipt

Add Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
SMB limit per file.

Note: You must itemize all items on the receipt so that the remaining balance is \$0.00.

6. Click the **Add Receipt** icon to attach an electronic copy of the receipt if the receipt has not been attached to the expense.
7. Click the **Save Itemization** button.

Adding Attendees to a Business Meal Expense

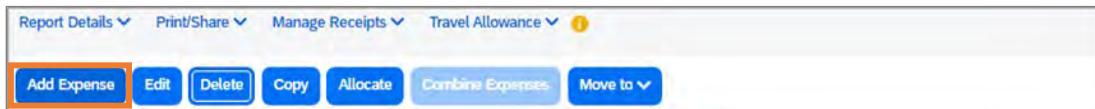
Some expenses, such as business meals and entertainment expenses require you to add attendees to the expense. You will see the Attendees link for these types of expenses. Depending on the number of meal attendees you will need to provide the following information.

- **Small Groups (eight or fewer individuals)** - If a small group is in attendance, the names of all persons attending is required.
- **Large Groups (nine or more individuals)** - If the expense includes more than eight attendees, the Event name and total number of attendees is required.

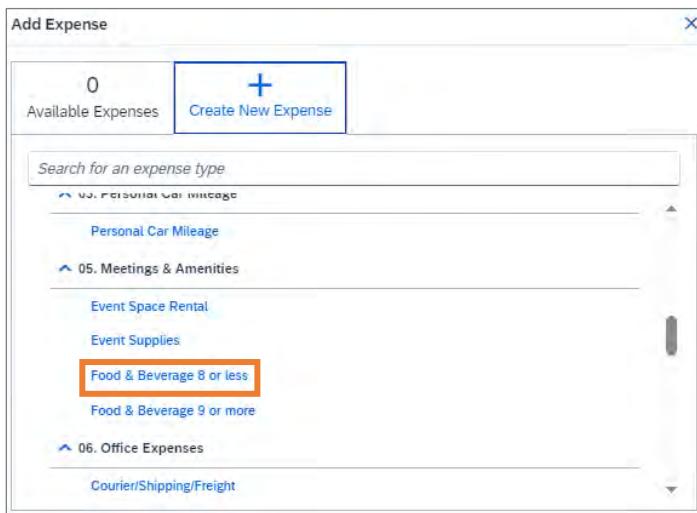
Adding Attendees to a Business Meal with 8 or less

Follow these steps to add attendees to a business meal of 8 or less people:

1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button.



3. Click the **Create New Expense** tab or **Available Expense** tab to access T&E card transactions.
4. Select **Food & Beverage 8 or less** from the Meetings & Amenities listings.



5. Complete all the required (noted by red asterisks) and necessary optional fields.

6. Click the **Attendees** link.

The screenshot shows the 'New Expense' page with two tabs at the top: 'Details' and 'Itemizations'. Below these tabs is a section titled 'Attendees (1)'. A red box highlights this section. To the right of 'Attendees (1)' is a link labeled 'Allocate'. Below this section, there are fields for 'Expense Type *' (set to 'Food & Beverage 8 or less') and 'Transaction Date *'. To the right of the transaction date field is a 'Traveler Type *' field.

Result: The Attendees page will appear. You will automatically be added as an attendee. If you did not attend the business meal, delete yourself from the listing.

7. Click the **Add** button.

The screenshot shows the 'Add Attendees' pop-up window. At the top, it displays 'Attendees' and a summary: 'Food & Beverage 8 or less \$156.25'. Below this is a table with columns: 'Attendee Name†', 'Attendee Title†', 'Institution/Company†', 'Attendee Type†', 'Attendee Count†', and 'Amount†'. A row for 'Cortney T.' is listed, showing 'Faculty/Staff/Student' in the 'Attendee Type' column, a count of '1' in the 'Attendee Count' column, and '\$156.25' in the 'Amount' column. At the bottom of the table are buttons for 'Add' (highlighted with a red box), 'Remove', 'Create Group', and 'Copy from Request'.

Result: The Add Attendees pop-up window will appear.

8. Search for and/or select the attendees from the optional tabs. Then follow the designated steps.

Attendees Tab – This tab allows you to search for attendees by first or last name with filters (Alumni, Faculty/Staff/Student, Guest, Research Participant, Student Athlete, Student(s), Visiting Professor). All Faculty/Staff/Students who have a Concur profile are available to search for and select under this tab. If you cannot find your attendee from the listing, you can create a new attendee on this tab.

- a. Search for, then click on the attendee.
- b. Select the employee from the search results and click add.
- c. Click the **Close** button.

The screenshot shows the 'Add Attendees' window. At the top, there are tabs for 'Attendees' (which is selected), 'Recent Attendees', 'Attendee Groups', and 'Import Attendees'. Below the tabs is a 'Search Criteria' section with fields for 'Attendee Type' (Faculty/Staff/Student), 'Last Name' (Test), 'First Name' (Test), 'Attendee Title' (Test), 'Institution/Company' (Test), 'Email Address' (Test), and 'Country/Region' (Test). A checkbox for 'Include inactive employees' is unchecked. Under 'Added Attendees', it says 'Added attendees will be listed here'. The 'Search Results' section displays a table with columns: 'Attendee Name', 'Email Address', 'Country/Region', 'Attendee Title', 'Institution/Company', and 'Attendee Type'. The results show several entries, with 'Test, Cortney' highlighted by a red box. To the right of the table are 'Add' buttons for each row. The bottom right corner of the window shows 'Results: 24'.

Result: The names selected will appear on the Attendees list page.

Recent Attendees Tab - This tab displays recently used attendees.

- Mark the Checkbox beside the attendees of the business meal.
- Click the **Add to List** button.

Result: The names selected will appear on the Attendees list page.

Attendees Group Tab – If you have created a group of attendees in advance, you can add them all at once with one click.

- Mark the Checkbox beside the Group that attended the business meal.
- Click the **Add to List** button.

Result: The names selected will appear on the Attendees list page. If any attendees need to be removed from the list, mark the check box next to their name(s), and click the Remove button.

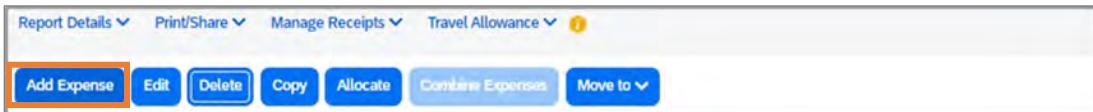
- Click the **Save** button.

Adding Attendees to a Business Meal with 9 or More

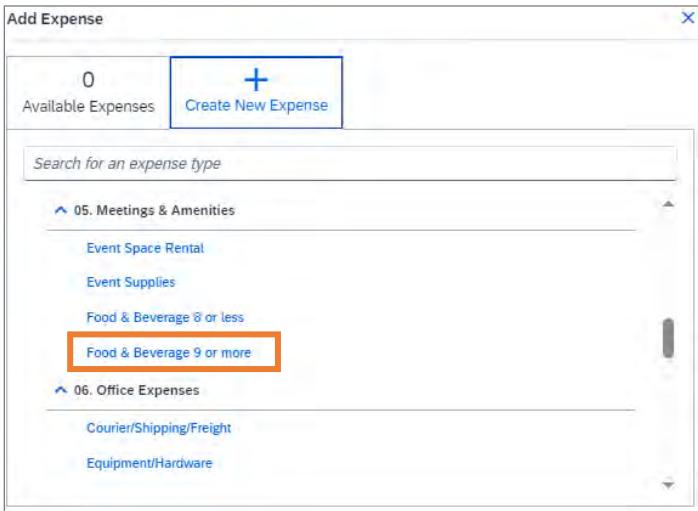
Follow these steps to add attendees to a business meal of 9 or more people:

- Open a current Expense Report or Create a New Report.

2. Click the **Add Expense** button.



3. Click the **Create New Expense** tab or **Available Expense** tab to access T&E card transactions.
4. Select **Food & Beverage 9 or more** from the Meetings & Amenities listings.



5. Complete all the required (noted by red asterisks) and necessary optional fields.

New Expense

Details Itemizations

Attendees (0) **Allocate**

Expense Type *: Food & Beverage 9 or more

Transaction Date *: MM/DD/YYYY

Trip Type *: In-State

City of Purchase: Charlotte, North Carolina

Amount *: US, Dollar (USD)

Personal Expense (do not reimburse)

Comment: 0/500

Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are jpg, jpeg, pdf, tif or gif.
5MB limit per file.

Save Expense **Save and Add Another** **Cancel**

6. Click the **Attendees** link.

The screenshot shows the 'New Expense' page. At the top, there are two tabs: 'Details' (selected) and 'Itemizations'. Below them is a section titled 'Attendees (0)' with a red box around it. To the right of this section is a link 'Allocate'. A note 'Required field' is located at the top right of the form area. The 'Expense Type' dropdown is set to 'Food & Beverage 9 or more'. There are also fields for 'Transaction Date' and 'Traveler Type'.

7. Click the **Add** button.

The screenshot shows the 'Add Attendees' pop-up window. It displays a single row of attendees: 'Food & Beverage 9 or more' with a value of '\$456.00'. Below this, a message says 'Attendees: 0'. At the bottom are four buttons: 'Add' (highlighted with a red box), 'Remove', 'Create Group', and 'Copy from Request'.

Result: The Add Attendees pop-up window will appear.

8. Click the **Attendees** tab and ensure the Attendee Type Group 9+ is selected.
9. Click the **Create New Attendee** link.

The screenshot shows the 'Add Attendees' pop-up window. The 'Attendees' tab is selected (highlighted with a red box). In the 'Search Criteria:' section, the 'Attendee Type' dropdown is set to 'Group 9+'. The 'Event Name' field is empty. A note 'Can't find an attendee' is followed by a link 'Create New Attendee' (highlighted with a red box). At the bottom are 'Reset' and 'Search' buttons, and a 'Close' link.

Result: The Create New Attendee pop-up window will appear.

10. Enter the event name in the Event Name field.

Note: This can be the business purpose of the event if it does not have an actual name.

11. Click the **Create Attendee** button.

The screenshot shows a 'Create New Attendee' dialog box. At the top left is a 'Go back' link. Below it, 'Attendee Type' is set to 'Group 9+'. To the right, 'Event Name' is a required field, indicated by a red asterisk and a red border around the input box. At the bottom right are 'Cancel' and 'Create Attendee' buttons, with 'Create Attendee' being highlighted by an orange border.

Result: The attendee group has been created.

12. Click the **Go Back** link.

The screenshot shows the same 'Create New Attendee' dialog box. Now, a green message bar at the top states 'Attendee added: USA Conference Meal'. The 'Event Name' field is empty and has a red asterisk. The 'Create Attendee' button is highlighted with an orange border.

Result: You will return to the Add Attendees pop-up window.

13. Click the **X** button.

Result: You will return to the Attendees page with the attendee group/event name you created displayed.

14. Enter the number of attendees in the Attendee Count field.

The screenshot shows the 'Attendees' dialog box. At the top, it displays 'Food & Beverage 9 or more \$456.00'. Below that, 'Attendees: 13' is shown. There are four buttons: 'Add', 'Remove', 'Create Group', and 'Copy from Recent'. A table follows with columns: 'Attendee Name*', 'Attendee Title', 'Institution/Company', 'Attendee Type', 'Attendee Count*', and 'Amount'. The 'Attendee Count*' column contains the value '13', which is highlighted with an orange box. The 'Amount' column shows '\$456.00'.

15. Click the **Save** button at the bottom of the page.

Result: Your attendees have been added to the expense.

Creating Attendee Groups

When adding attendees to any meal you can also create groups that you can use in the future to quickly add several individuals to a meal in just a few clicks.

Follow these steps to create a group:

1. Complete steps 1 to 8 from *Adding Attendees to a Business Meal* section.
2. Ensure that the individuals you want to include are identified by marking the check box beside their name.
3. Click the **Create Group** button.

The screenshot shows the 'Create Group' dialog box. At the top, it displays 'Food & Beverage 8 or less \$143.25'. Below that, 'Attendees: 5' is shown. There are four buttons: 'Add', 'Remove', 'Create Group', and 'Copy from Recent'. A table follows with columns: 'Attendee Name*', 'Attendee Title', 'Institution/Company', 'Attendee Type', 'Attendee Count*', and 'Amount'. The 'Attendee Name*' column lists 'Test, Cortney', 'Test, Colette', 'Test, Joshua', and 'Test, John'. The first three names are highlighted with an orange box. The 'Create Group' button is also highlighted with an orange box.

Result: A Create Group popup window will appear.

4. Enter a name for the Group Name.

5. Click the **Save** button.



Result: The group is created and can be used in the future to quickly add members of that group as meal attendees.

15. Submitting, Printing, and Emailing Expense Reports

Once you have finished completing an expense report and attached the required documentation, it is ready to be submitted. Reports can also be printed, saved as a PDF, or emailed for your records.

Also, once an Expense Report is created and submitted it will automatically generate a Report ID number. The Report ID number from Concur will be included in the invoice number field in ConnectCarolina.

Important: All hard-stop alerts (red circle with white "X" icon) must be resolved before an Expense Report can be submitted.

Submitting an Expense Report

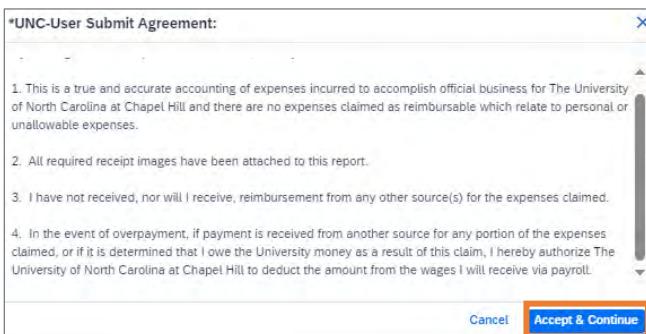
After reviewing your expenses and attaching your receipts, you will need to submit your expense report. If you are acting as a personal delegate and creating an Expense Report on behalf of another user, you will not have the option to submit the expense report. Delegates can prepare the expense report and then use the Notify feature to alert the traveler when the expense report is ready to be submitted. Follow these steps to submit an expense report:

1. From the manage expenses page, open the expense report you want to submit.
2. Click the **Submit Report** button.

The screenshot shows the Concur expense report interface. At the top, it displays the report title 'MINT Conference \$170.76'. Below the title, there's a summary box showing 'Approved: \$170.76' and 'Remaining: \$299.60'. On the right side of the screen, there are three buttons: 'Delete Report', 'Copy Report', and 'Submit Report', with 'Submit Report' being highlighted by a red box. The main area contains sections for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. Under 'Report Details', there are buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Resubmit', 'Combine Expenses', and 'Move to My'. There are also sections for 'Alerts', 'Receipts', 'Payment Type', 'Expense Type', and 'Vendor Details'. A table lists vendor details for Best Western International, Charlotte, North Carolina, with two entries: one for 01/15/2024 and another for 01/16/2024. The total amount shown at the bottom is \$170.76.

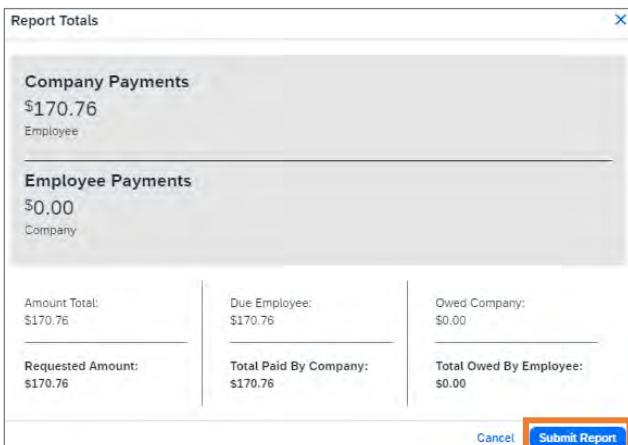
Result: A UNC-User Submit Agreement pop-up window will appear.

3. Click the **Accept & Continue** button.



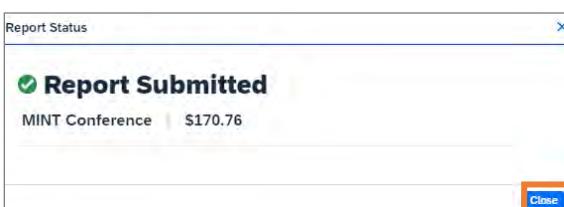
Result: A Report Totals pop-up window will appear. This displays the total amounts, the amount the University (company) will pay, and/or how much the employee owes the University.

4. Click the **Submit Report** button.



Result: A Report Status pop-up window will appear.

5. Click the **Close** button.



Result: The report is submitted, and the status is listed in the Active Reports list.

Printing or Emailing an Expense Report

Follow these steps to print or email an expense report:

1. From the manage expenses page, open the expense report you want to print or email.
2. Click the **Print/Share** dropdown arrow.
3. Select ***UNC-Travel & Expense Report Detail Report**.



MINT Conference \$170.76

Submitted & Pending Supervisor Approval | Report Number: T95UBC

REQUEST

Approved - \$470.35	Remaining \$299.66
---------------------	--------------------

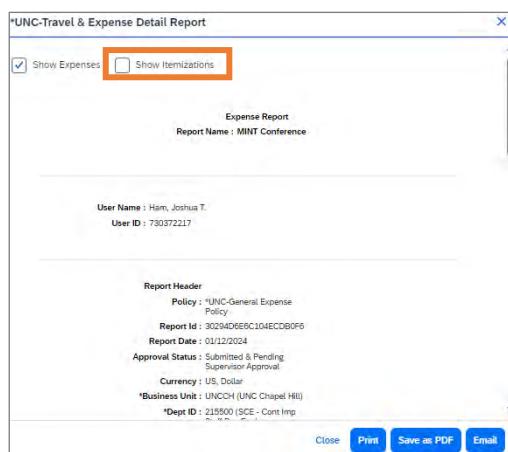
Report Details ▾ Print/Share ▾ Manage Receipts ▾

***UNC-Travel & Expense Detail Report**

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
⚠️	Out of Pocket		Hotel	Best Western International Charlotte, North Carolina	01/15/2024	\$170.76 Remained
⚠️	Out of Pocket		Hotel	Best Western International Charlotte, North Carolina	01/16/2024	\$170.76

Result: A preview of the report will appear in a pop-up window.

Note: If you want an itemized version of the report, check the Show Itemizations box.



*UNC-Travel & Expense Detail Report

Show Expenses Show Itemizations

Expense Report
Report Name : MINT Conference

User Name : Ham, Joshua T.
User ID : 730372217

Report Header
Policy : *UNC-General Expense Policy
Report Id : 30294D668C104ECD80F6
Report Date : 01/12/2024
Approval Status : Submitted & Pending Supervisor Approval
Currency : US Dollar
*Business Unit : UNCOH (UNC Chapel Hill)
*Dept ID : 215000 (SCE - Cont Imp)

Close Print Save as PDF Email

4. Click the **Print, Save as PDF, or Email** button to publish the report.

16. Managing Expense Reports

Correcting and Resubmitting an Expense Report

Your approver may return your expense report to you if any changes or additional information are required. Returned reports appear on the Concur home page in the Open Reports section. Follow these steps to correct and resubmit an expense report:

1. Click the **Open Reports** tile or tab.

The screenshot shows the SAP Concur Home page. At the top right, there are four status indicators: '+ New' (00), 'Required Approvals' (04), 'Authorization Requests' (00), and 'Available Expenses' (00). To the right of these is a box containing '05 Open Reports' with an orange border and an orange arrow pointing to it from the previous step's description. Below this, there is a 'Company Notes' section with a note about gender selection for TSA. Further down is a 'My Tasks' section with three items: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (05), which is also highlighted with an orange border and an orange arrow. A detailed list of reports follows: '04/04 Mint Conference', '04/02 USA Conference \$456.00', '04/01 MINT Conference \$456.00', and '04/01 Copy: MINT Conference \$322.26'. At the bottom left, there is a 'Trip Search' section and a 'My Trips (0)' section.

2. Click on the Returned expense report.

The screenshot shows the 'Manage Expenses' screen under the 'Report Library'. It lists two expense reports: 'MINT Conference' dated 04/04/2024 with a total of '\$170.76' and a red alert status 'Returned', and 'USA Conference' dated 04/02/2024 with a total of '\$456.00' and a status 'Not Submitted'. The 'Returned' report is highlighted with an orange border.

Note: Returned expense reports will have a red alert a status of "Returned".

- Click the **Report Details** dropdown and then **Report Timeline**.

MINT Conference \$170.76

Returned | Report Number: T95UBC

REQUEST
Approved
\$170.76

Report Details Print/Share Manage Receipts Travel Allowance

Report Delete Copy Associate Combine Expenses Move to

Report Timeline

Report Header

Allocation Summary
Report Payments
Linked Add-ons
Manage Requests
Manage Cash Advances

Payment Type	Expense Type	Vendor Details	Date	Requested
Out of Pocket	Hotel	Best Western International Charlotte, North Carolina	01/15/2024	\$170.76 Invoiced
Out of Pocket	Hotel	Best Western International Charlotte, North Carolina	01/16/2024	\$170.76
				\$170.76

View Available Receipts

- Review the approvers explanation of why the report was returned.
- Click the **Close** button.

Report Timeline

MINT Conference | \$170.76

Approval Flow

- Supervisor Approval (Test_Cortney)
- Designated Approval
- Business Office Approval
- Travel Team Review

Report Summary

SUBMITTED Test_Joshua 04/01/2024

SUBMITTED & PENDING SUPERVISOR APPROVAL Test_Joshua 04/01/2024

SUBMITTED Test_Joshua 04/02/2024

SUBMITTED & PENDING SUPERVISOR APPROVAL Test_Joshua 04/02/2024

SUBMITTED Test_Joshua 04/04/2024

SUBMITTED & PENDING SUPERVISOR APPROVAL Test_Joshua 04/04/2024

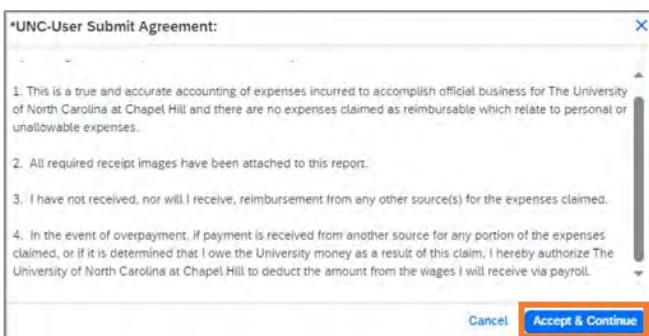
REPORT COMMENT Test_Cortney (04/04/2024)
Sending this back for further edits.

Close

- Click the expense that requires corrections/edits.
- Make the required corrections/edits.
- Click the **Save Expense** button.
- Click the **Submit Report** button.

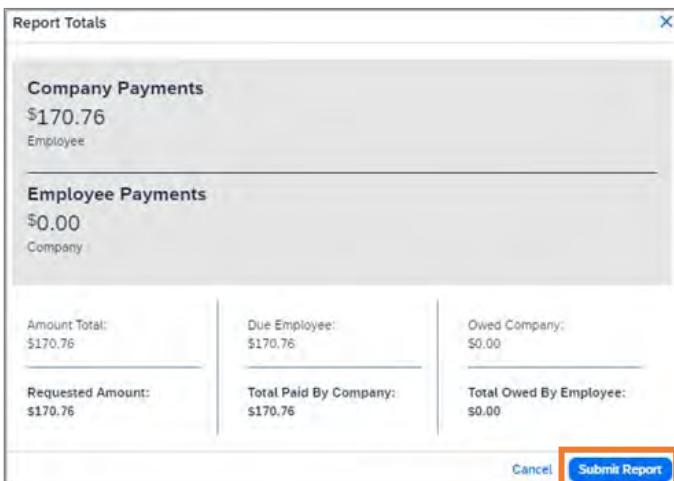
Result: A UNC-User Submit Agreement pop-up window will appear.

10. Click the **Accept & Continue button.**



Result: A Report Total pop-up window will appear. This displays the total amounts, the amount the University (company) will pay, and/or how much the employee owes the University.

11. Click the **Submit Report button.**



Result: A Report Status pop-up window will appear confirming that the report has been submitted.

12. Click the **Close button.**

Result: The report is submitted, and the status is listed in the Active Reports list.

Recalling an Expense Report

If you submit an expense report and later find that you need to make changes, you can recall the expense report. Reports can be recalled as long as they do not have a status of "Pending Payment". If a report is recalled during the approval process, it will restart the entire workflow approval process. Also, once an Expense Report is fully approved it cannot be recalled. Follow these steps to recall an expense report that you have submitted:

1. Click the **Open Reports** tile or tab.

The screenshot shows the SAP Concur Home page. At the top right, there is a navigation bar with icons for New, Required Approvals (00), Authorization Requests (04), Available Expenses (00), and Open Reports (05). The 'Open Reports' button is highlighted with an orange box and has an arrow pointing down to the corresponding section in the main content area. The main content area includes sections for Trip Search, Company Notes, and My Tasks. The 'My Tasks' section shows three categories: Required Approvals (00), Available Expenses (00), and Open Reports (05), each with a blue button and an arrow pointing to a list of reports. The 'Open Reports' list includes items like '04/04 Mint Conference', '04/04 Mint Conference', '04/02 USA Conference \$456.00', '04/01 MINT Conference \$456.00', and '04/01 Copy: MINT Conference \$322.26'. A purple note in the Company Notes section states: 'When selecting your gender in the Transportation Security Administration (TSA) portion of your profile, employees may now choose from the following: Male (M), Female (F), Unspecified (X) or Undisclosed (U). As a reminder, this selection must match the gender on the government-issued photo ID which you use for travel.' A 'Read more' link is located at the bottom of this note.

2. Click on the **Submitted** expense report.

The screenshot shows the SAP Concur Manage Expenses page. At the top, there is a navigation bar with tabs for Requests, Travel, Expense (which is selected), Approvals, and App Center. Below the navigation bar, there are links for Manage Expenses, Card Transactions, and Cash Advances. The main content area is titled 'Manage Expenses' and features a 'Report Library' section. It shows a list of expense reports with columns for the report title, date, amount, and status. One report, 'MINT Conference' dated 04/01/2024 with an amount of '\$170.76', is highlighted with an orange box. This report has a green status indicator with the word 'Submitted' and a small checkmark icon. The status also says 'Submitted & Pending Supervisor Approval' and lists the employee name 'Courtney Alston'.

Note: Expense reports that are in the process of being reviewed/approved will have an alert in green with a status of "Submitted".

3. Click the **Recall Report** button.

The screenshot shows a Concur expense report for a 'MINT Conference \$170.76'. At the top right, there are two buttons: 'Copy Report' and 'Recall Report', with 'Recall Report' being highlighted with an orange border. Below the buttons, there's a summary box for 'REQUEST' showing 'Approved: \$470.36' and 'Remaining: \$470.36'. Underneath are links for 'Report Details', 'Print/Share', and 'Manage Receipts'. A table lists expense details with columns for 'Alerts', 'Receipt', 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. Two rows are shown, both for 'Out of Pocket' payments to 'Best Western International' in Charlotte, North Carolina, dated 01/15/2024 and 01/16/2024, with amounts of \$170.76 each. The 'Requested' column shows the total amount of \$170.76. A 'View' dropdown menu is also visible.

Result: A confirmation pop-up message will appear.

4. Click the **Yes** button.



Result: The report will be recalled, the status changes to "Sent Back to User", and the report can now be edited.

17. Reviewing and Approving Expense Reports

If you are an approver, you will need to review submitted expense reports and approve them for reimbursement. Approval delegates can also preview or approve expense reports, depending on their assigned permissions. You can view a list of any reports or requests waiting your approval from the Concur home pages in the My Task section, from the Approvals tab at the top of the screen.

Approving Expense Reports

Follow these steps to approve an expense report:

1. Click the **Required Approvals** tile or tab.

The screenshot shows the SAP Concur Home page for The University of North Carolina at Chapel Hill. At the top right, there are several status indicators: '+ New' (0), '00 Required Approvals' (highlighted with a red box and an arrow pointing to it), '04 Authorization Requests', '00 Available Expenses', '05 Open Reports', and '00 Cash Advances'. Below these, the 'My Tasks' section is displayed with three categories: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (05). Each category has a description and a checkmark icon. The 'Required Approvals' section says 'Great! You currently have no approvals.' The 'Available Expenses' section says 'You currently have no available expenses.' The 'Open Reports' section lists several reports with dates and descriptions, such as '04/04 Mint Conference', '04/02 USA Conference \$456.00', '04/01 MINT Conference \$456.00', and '04/01 Copy: MINT Conference \$322.26'. On the left side, there are sections for 'Trip Search' and 'Company Notes'.

Result: The Approvals page will appear.

- Click on the Report Name that you want to review for approval.

Approvals																					
00 Requests	07 Expense Reports																				
Expense Reports																					
<table border="1"> <thead> <tr> <th>Report Name</th> <th>Employee</th> <th>Report Date</th> <th>Amount Due Employee</th> <th>Requested Amount</th> </tr> </thead> <tbody> <tr> <td>WE Symposium</td> <td>Tell, Cortney</td> <td>04/05/2024</td> <td>\$0.00</td> <td>\$158.00</td> </tr> <tr> <td>Recruitment Lunch for Tom Henn</td> <td>Tell, Joshua</td> <td>04/04/2024</td> <td>\$76.88</td> <td>\$76.88</td> </tr> <tr> <td>Administrative Professionals Month</td> <td>Tell, Cortney</td> <td>04/03/2024</td> <td>\$164.61</td> <td>\$164.61</td> </tr> </tbody> </table>		Report Name	Employee	Report Date	Amount Due Employee	Requested Amount	WE Symposium	Tell, Cortney	04/05/2024	\$0.00	\$158.00	Recruitment Lunch for Tom Henn	Tell, Joshua	04/04/2024	\$76.88	\$76.88	Administrative Professionals Month	Tell, Cortney	04/03/2024	\$164.61	\$164.61
Report Name	Employee	Report Date	Amount Due Employee	Requested Amount																	
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Administrative Professionals Month	Tell, Cortney	04/03/2024	\$164.61	\$164.61																	
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WE Symposium	Tell, Cortney	04/05/2024	\$0.00	\$158.00																	
Recruitment Lunch for Tom Henn	Tell, Joshua	04/04/2024	\$76.88	\$76.88																	
Administrative Professionals Month	Tell, Cortney	04/03/2024	\$164.61	\$164.61																	

Result: The Summary expense report will appear.

- Click on the following to review the expense:

- Details** – This link dropdown option will display various elements of the expenses included in the report.

ASPPH Annual Meeting [SIMS E]

Expense

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments

Allocations

- Allocations

Travel Allowances

- Itineraries
- Expenses & Adjustments
- Reimbursable Allowances Summary

- Receipts** – This link dropdown option will allow you to review attached receipts and add receipts if necessary.

ASPPH Annual Meeting [SIMS E]

Expenses

Transactions

Receipts

- Receipts Required
- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images

- Click the **Approve** button, to certify that you have reviewed the report and it is in compliance with University policies.

ASPPH Annual Meeting Test, Cortney

Send Back to User **Approve** Approve & Forward

Result: A Final Confirmation pop-up window will appear.

- Click the **Accept** button.



Result: The Expense Report is approved and will no longer be shown on your list of Pending Reports.

Approving and Forwarding an Expense Report (Adding an Additional Review Step)

All approvers can add additional Approvers to an approval workflow. However, not all Approvers can Forward reports. The ability to Forward a report is dependent on the type of Approver a user is. Depending on the type of approver you are, the Concur system will determine the options that are available.

Important: If you need to add an additional step of approval, you must add the Approver or Business Officers before you approve the report.

Adding an Additional Approver or Business Officer

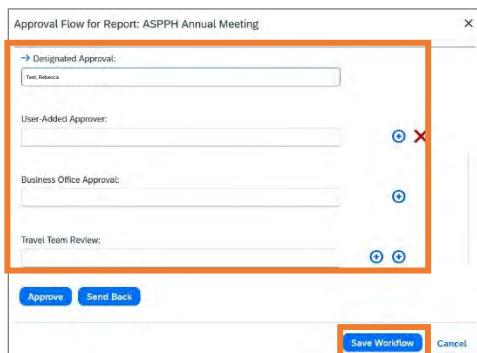
Follow these steps to add an additional approver, before approving a report:

- Complete steps 1 to 2 from *Approving an Expense Report*.
- Click the **Details** link drop-down.
- Select **Approval Flow**.



- Click the + icon where you wish to insert the approver.
- Search for and select the additional Approver or Business Officer.

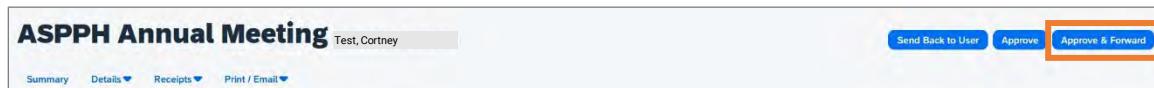
6. Click the **Save Workflow** button.



Approving and Forwarding an Expense Report

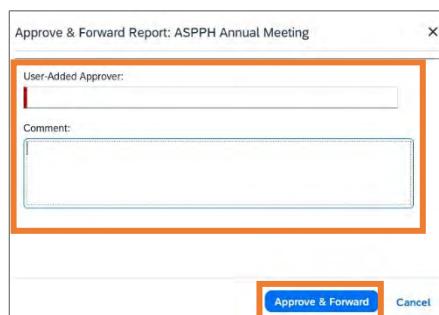
Depending on the type of approver you are, the system will determine what forwarding options are available. If you do not see the Approve & Forward button you do not have the ability to approve and forward the report. Approve & Forward updates the Approval Flow like the steps above, except it only gives you the option to add an additional approver as the immediate next step in the workflow. Follow these steps to approve and forward the expense report for additional review:

1. Complete steps 1 to 3 from *Approving an Expense Report*.
2. Click the **Approve & Forward** button to certify that you have reviewed the report and it is in compliance with University policies.



Result: An Approve & Forward Report pop-up window will appear.

3. Enter the name of the individual who will further review and approve the report along with any comments.
4. Click the **Approve & Forward** button.



Result: The Expense Report is approved and will no longer be shown on your list of Pending Reports.

Sending an Expense Report Back to the User

Follow these steps to send an expense report back to the user:

1. Click the **Required Approvals** tile or tab.

The screenshot shows the SAP Concur Home page. At the top, there is a navigation bar with links for 'New', 'Required Approvals' (which is highlighted with an orange box), 'Authorization Requests', 'Available Expenses', 'Open Reports', and 'Cash Advances'. Below the navigation bar, there is a 'Company Notes' section with a message about gender selection for TSA profile. On the left, there is a 'Trip Search' section with flight and train search options. In the center, there is a 'My Tasks' section titled 'Required Approvals' (also highlighted with an orange box). An arrow points from the 'Required Approvals' link in the top navigation to this section. The 'My Tasks' section shows three categories: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (05). The 'Required Approvals' section indicates 'Great! You currently have no approvals.' and shows a checkmark icon. The 'Available Expenses' section indicates 'You currently have no available expenses.' and also shows a checkmark icon. The 'Open Reports' section lists several reports with their details.

Result: The Approvals page will appear.

2. Click on the Report Name that you want to send back to the user.

The screenshot shows the 'Approvals' page. At the top, there are two tabs: 'Requests' (00) and 'Expense Reports' (07), with 'Expense Reports' being the active tab (highlighted with an orange box). Below the tabs, there is a table titled 'Expense Reports' with columns for 'Report Name', 'Employee', 'Report Date', 'Amount Due Employee', and 'Requested Amount'. The first row in the table is highlighted with an orange box. The table data is as follows:

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
WIE Symposium	Test, Cortney	04/05/2024	\$0.00	\$158.00
Recruitment Lunch for Tom Harris	Test, Joshua	04/04/2024	\$76.86	\$76.86
Administrative Professionals Month	Test, Cortney	04/03/2024	\$164.61	\$164.61

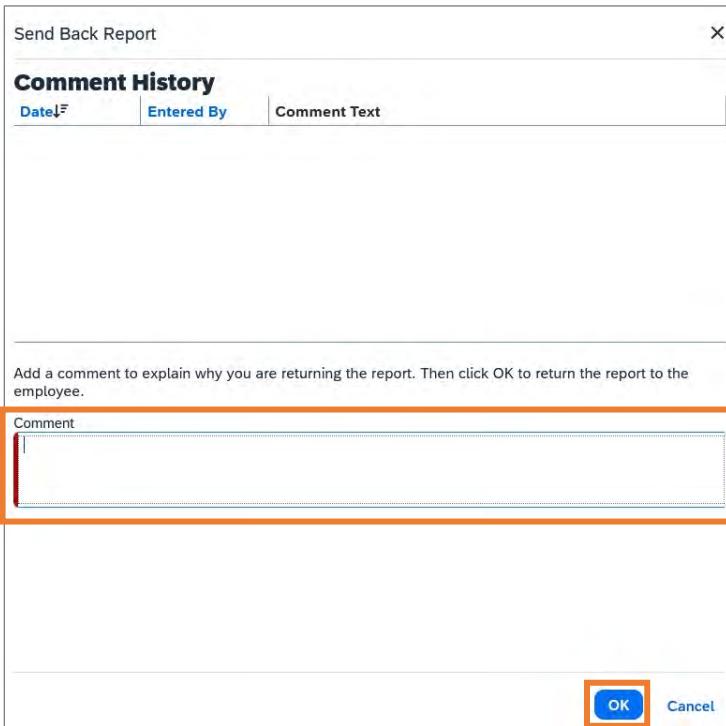
Result: The Summary expense report will appear.

3. Click the **Send Back to User** button.

The screenshot shows the summary expense report for the 'ASPPH Annual Meeting'. At the top, it displays the report name 'ASPPH Annual Meeting' and the employee name 'Test, Cortney'. Below the report name, there are navigation links for 'Summary', 'Details', 'Receipts', and 'Print / Email'. At the bottom right, there are three buttons: 'Send Back to User' (highlighted with an orange box), 'Approve', and 'Approve & Forward'.

4. Enter comments explaining why you are returning the report, this is a required field.

5. Click the **OK** button.



Result: A pop-up confirmation message will appear. The request for approval will be removed from your pending approval list and returned to the user.

18. Concur Buttons and Icons

General Icons

The following icons can be found in Expense and Request and have the same meaning in each product.

Icon	Name	Description
	Exception	Indicates an exception must be resolved before submission.
	Quick Help	Indicates additional guidance or a helpful tip is available.
	Information	Indicates an exception that does not prevent submission.
	Alert/Warning	Indicates an exception that does not prevent submission.
	Calendar	Indicates that the user can click the icon to access the calendar popup.
	View Image	Indicates that the user can click the icon to view an image.
	Report Sent Back	Indicates that the approver sent a report back to the submitter with comments.

Expense Icons

The following icons can be found in Expense:

Icon	Name	Description
	Attendees	Indicates that an expense entry has associated attendees.
	Comments	Indicates that the expense or report contains a comment.
	Personal Expense	Indicates that an expense entry was marked as personal.
	Credit Card Transaction	Indicates that an expense entry originated from a credit card transaction.
	Credit Card transaction	Indicates that the credit card transaction includes additional data.
	Full Allocation	Indicates that the expense entry has been fully allocated.
	Partial Allocation	Indicates that the expense entry has only been partially allocated.
	Receipt Image Required	Indicates that an imaged receipt is required for this expense.
	E-Receipt Available	Indicates that an e-receipt is available in Available Expenses.
	Missing Receipt Affidavit	Indicates that a missing receipt is available in Available Expenses.
	Report Ready for Review	Indicates that the expense report has been reviewed by a delegate and is ready for delegator review and submission.
	Success	Indicates that all required approvals have been processed.

	Acting as Others	Indicates that the user is acting as a delegate for another user.
	Acting as Other User	Indicates that the user is acting as a delegate for another user.
	Personal Profile	A circle with the users initials. Indicates that the user can click the icon to access their personal profile.
	Personal Car Mileage Calculator	Indicates that the user can click the icon to access the personal car mileage calculator.
	Receipt Attached	Like other expense report entries, this entry has a receipt image attached to it.

Booking & Trip Icons

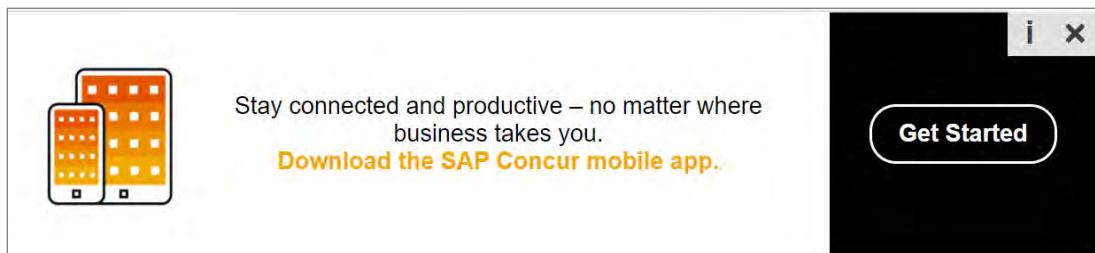
The following icons can be found in Travel:

Icon	Name	Description
	Fly America Act Compliant	Indicates that the flight is compliant with the Fly America Act.
	Mixed Flight/Train Search	Indicates that the user can click the icon to access the mixed flight/train search window.
	Hotel Search	Indicates that the user can click the icon to access the hotel search window.
	Car Search	Indicates that the user can click the icon to access the car search window.
	Train Search	Indicates that the user can click the icon to access the training search window.
	Flight Status	Indicates that the user can click the icon to view the statues of a flight.
	Finalize Trip	Indicates finalization of a trip.
	Flight Itinerary	Indicates flight itinerary information.
	Hotel Itinerary	Indicates hotel itinerary information.
	Car Itinerary	Indicates car itinerary information.
	Add Itinerary	Indicates a user can add itinerary to a trip.
	Warning Exception	Indicates that travel policy will be applied after the user selects the flight.
	Quiet Car	Indicates that the rail car has noise restrictions.

19. Using the Concur Mobile App

The Concur Mobile App allows you to keep track of your expenses from your mobile device. The application is free to download, and these instructions apply to iPhone and Android mobile devices. With the app you can:

- upload receipts,
- review and approve expense reports,
- itemize hotel charges,
- and more!



Begin by downloading the Concur Mobile application to your device. You will use the Single Sign On (SSO) method along with your ONYEN Username and Password to complete the sign in process.

Important: Do not create your own account. You must access your account using your ONYEN.

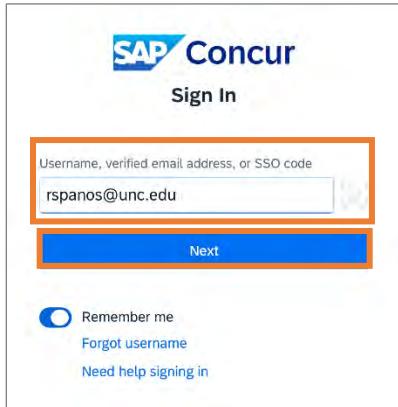
Signing into the Concur Mobile App

Follow these steps to sign into the mobile app:

1. Download the app to your device.
2. Open the Concur Mobile App.
3. Enter your ONYEN@unc.edu as the username.

Note: You may also enter your UNCCH email address if it has been verified on your Concur Profile.

4. Tap the **Next** button.



The SAP Concur sign-in page is displayed. At the top is the SAP Concur logo and the word "Sign In". Below that is a text input field labeled "Username, verified email address, or SSO code" containing "rspanos@unc.edu". A blue "Next" button is positioned below the input field. At the bottom left are links for "Remember me", "Forgot username", and "Need help signing in". The entire input field and the "Next" button are highlighted with a red box.

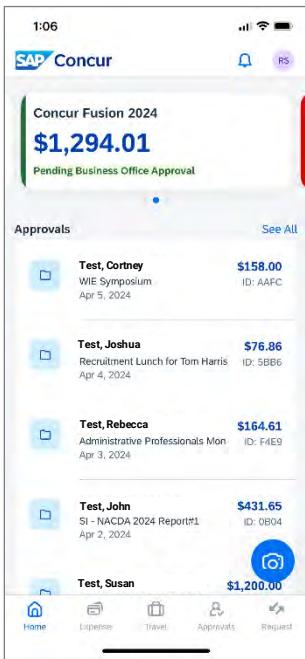
5. Tap the **UNC SSO** button.



The SAP Concur sign-in page is displayed. At the top is the SAP Concur logo and the word "Sign In". Below that is a text input field containing "rspanos@unc.edu". A link "Sign in with:" is followed by two buttons: a blue "UNC Single Sign-On" button and a blue "SAP Concur Password" button. The "UNC Single Sign-On" button is highlighted with a red box.

6. On the UNC-CH Single-Sign On screen, enter your ONYEN and password.
7. Tap the **Sign In** button.
8. Complete Duo Authentication.

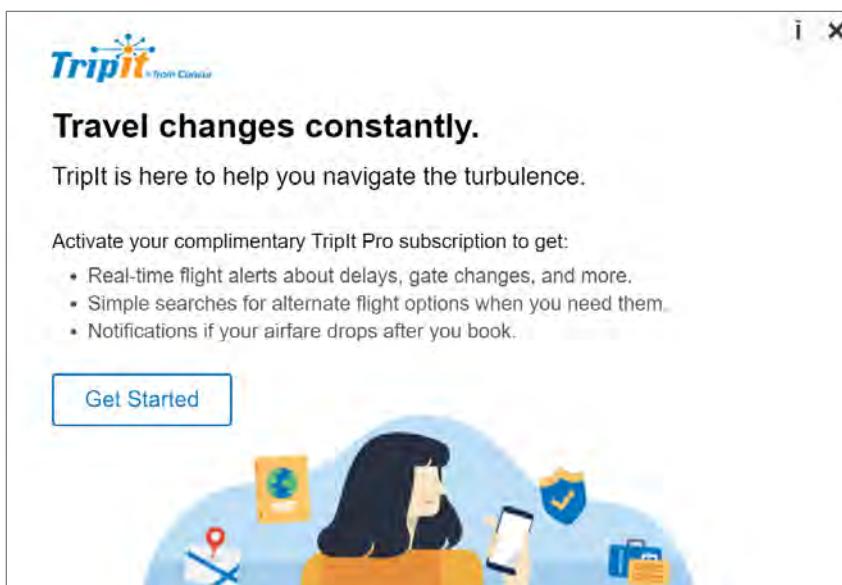
Result: You will see the Home screen of the app. From here you can perform many actions that you would normally complete using a computer.



20. TripLink

TripLink utilizes My Travel Network, and Tripl Pro app to help you organize and manage your travel bookings and receipts. It is an extended service that the University has purchased for all UNC-Chapel Hill Concur system users.

- **My Travel Network** - Leverages reward programs with Concur's connected travel partners to bring receipts directly into your Concur Expense profile.
- **Tripl Pro** - This app helps you organize your travel plans and receive real-time alerts and helpful reminders throughout your trip. To activate your Tripl Pro Subscription you must create a Tripl Account using your UNC-Chapel Hill email address before using the app.



To learn more about TripLink, enroll, and/or activate My Travel Network or Tripl Pro click the App Center on the banner in the Concur system or visit [Concur's Travel Made Easy webpage](#).

21. Resources for Help and Support

Concur Support Desk

The Concur Support Desk provides support with Concur Request and Concur Expense. Users may request assistance via email response, phone call or a Zoom/Teams Meeting. To submit a help ticket to the Concur Support Desk, visit go.unc.edu/concursupport or follow these steps to contact the Concur User Support Desk:

1. Navigate to help.unc.edu.
2. Select the Onyen Login button and login via UNC Single Sign-on.
3. In the search field, enter “Concur” and click the magnifying glass to search.
4. Click the link for “Travel Services- Concur Support Desk”.
5. Complete the required fields, add additional information and upload attachments as needed.
6. Click the Request button to submit the help ticket.

Result: A help ticket has been submitted and will be responded to within 1-2 business days.

World Travel Inc.

World Travel, Inc. is a global mid-market leader in corporate travel management and the designated travel agency for the University. Should you need assistance with booking a trip you can utilize their live chat feature for support within the Concur System or contact them directly. Live chat is available from 8:00 am to 8:00 pm (Eastern Standard Time). Also, if you need to book a trip outside of the Concur Travel System, contact your World Travel, Inc agent. Dedicated agents are available to assist from 8 am to 6 pm, Monday through Friday; emails are only monitored during that time. While after-hours support is available, including weekends and holidays, the after-hours team should only be contacted when there is an urgent need to book, exchange, or cancel a reservation.





THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Welcome University of North Carolina Chapel Hill
Your Designated Agent Team: 877-602-4950
Calling from outside the United States? Please call: 484-948-2535
Monday-Friday 8:00a – 6:00p Eastern
Email your [designated UNC at Chapel Hill agents](#)

Training and Other Materials

Computer-based training (CBT) and quick reference cards (QRC's) are available to provide additional guidance on completing various task in the Concur system. Please visit the [UNC-Chapel Hill Travel Office webpage](#) to gain access to trainings and additional reference materials.

22. Frequently Asked Questions

Approvers, Delegates, and Workflows

Q: How soon can a delegate receive approvals after they have been added as an approval delegate?

A: Delegates will have immediate access to the approver queue to which they have been assigned a delegate for, and they would only receive email notifications for new requests/reports once they have been submitted.

Q: Will approval delegates receive copies of approval emails?

A: Delegates can receive approval emails as long as the delegator has turned on the permissions setting for them to receive approval messages.

Q: If someone from another department travels on my department's funds, will both departments be included in the approval workflow?

A: If the traveler has a default approver on their profile, requests/reports will always flow to them first regardless of the funding source of travel. The additional approval workflow will depend on the chartfield string of the request/report. When the request/report is submitted, the request/report will route to the approvers of the chartfield string assigned. If the chartfield string is updated during the approval process, the workflow will update to include any other necessary approvers.

Q: If the primary approver (as designated in ConnectCarolina) travels, will their travel request and expense report be auto approved or will their delegates be able to review/approve.

A: Department Approvers (as assigned in ConnectCarolina) must assign their supervisor as the Default Approver on their profile to ensure proper approval and workflow routing. If a traveler submits a report against the same department ID for

which they are an approver in ConnectCarolina, it will not go to them or their delegates for approval.

Q: Will approvers and delegates be able to review actions that are submitted for approval prior to them being added to their delegate or approval role?

A: Delegates have access to anything that is outstanding in the Approver's queue, and access to look at anything that has been previously approved by using search and filter options. Approvers only have access to requests/reports that are newly submitted or resubmitted for approval after they were added as an Approver.

Q: Can a submitter and approver be the same individual when submitting a Report for reimbursement?

A: No one can submit a report on behalf of another end user, and no one can approve their own submissions. All end users must submit their own Reports for reimbursement. If a Delegate submits a travel request on behalf of another user, they will not be able to approve that submission. The system will automatically skip them in the workflow.

Q: How many people can you delegate to in Concur?

A: There is no limit to the number of delegates you can create.

Air Travel, Car Rental, and Hotel

Q: Why do I always see information about Basic Economy Fares when searching for Airfare?

A: The low cost of Basic Economy Fares can look very appealing, but we need to ensure that all travelers understand the restrictive nature of these fares before booking. While the university allows for the purchase of Basic Economy Fares, we do not encourage travelers to utilize them.

Q: What happens if I book a flight that is flagged as “out of policy?”

A: You will be able to book this flight but will be asked to select an out of policy reason from a dropdown. You may also provide additional details to explain the out-of-policy selection. This information will be reviewed during the expense report process to ensure that the traveler had an allowable exception to book out of policy.

Q: Should I purchase additional insurance for my rental vehicle?

A: If your vehicle will only be driven in the United States, you must decline the optional insurance offered by the rental car company. Insurance is provided for all university employees by the State of North Carolina and cannot be reimbursed. When renting a vehicle for travel outside of the United States, you should pay for the optional insurances offered. These expenses can be paid for on the T&E Card or submitted for reimbursement.

Q: Why am I seeing the Hotel Per Diem Locations page?

A: The University utilizes the federal lodging rates to determine when excess lodging is incurred. Lodging should be secured at no more than 150% of the federal lodging rate for their destination. If lodging is secured at a higher rate, the user will have to provide a business reason for excess lodging on their expense report.

Finance and ConnectCarolina

Q: If a traveler does not require CABS, what happens if a traveler takes a trip and incurs all expenses then submits a Report for reimbursement?

A: Concur Request is the process in which travelers request pre-trip authorization, the State requires all overnight travel to be pre-approved. An Expense Report must be submitted in Concur Expense for reimbursement of business travel related expenses.

Q: Can a user add a chartfield string to Concur System?

A: No, all chartfields are automatically loaded into Concur and updated nightly.

Q: Will a budget error in Concur stop a reimbursement from being issued?

A: No, transactions will go to CBM then a journal entry will be created. If a budget error occurs, the transaction will be charged to the default travel chartfield string as designated by the department.

Personal Meals and Per Diems

Q: Can reimbursed meals be reduced to a lesser amount than the per diem?

A: Per diem reimbursement amounts are hard-coded into the system. However, if the traveler wished to receive less than the full per diem, the individual should submit fewer meals for reimbursement.

Q: Are we allowed meal reimbursement for day trips?

A: No, personal meal per diem is only allowed when the travel requires an overnight stay.

Policy, Documentation, and Forms

Q: Were historical travel documents and information transferred to Concur?

A: No data or information from any travel prior to the go live date will be transferred to Concur.

Q: Is the Travel Acknowledgment form still required?

A: No, since the traveler will be submitting their own expense reports the Travel Acknowledgement form is no longer required.

Miscellaneous

Q: Do I have to submit a travel request in advance to travel that does not include overnight travel?

A: No, a travel request is only required for overnight travel or for day-travel which includes airfare.

Q: Do student employees have access to use Concur?

A: All faculty, staff, and some student employees will automatically have access to Concur. For students who are not automatically loaded a formal process for requesting and reimbursing student travel is being developed.

Q: How early can travel requests be submitted?

A: Travel requests can be submitted as far in advance as necessary. However, expenses paid for out-of-pocket will only be reimbursed after the trip is completed.

Q: Is there any required training prior to gaining access to the Concur system?

A: No, but online training and additional support is available; please review the section [Resources for Help and Support](#).