

# From Paper to Performance: The **Concur** Advantage

*Presented by:*

Anne Brown, Special Asst. to the VC for Business Affairs

Amy Hisler, Controller

*The purpose of this webinar is to provide a high-level introduction and update on the Concur implementation.*



# Tips for a meaningful and engaging session



- 1. We don't have access to your camera or microphone.**  
We can't see or hear you - make yourself comfortable in your own space!
- 2. Use the Q&A button to ask a question.**  
You can submit your questions throughout the presentation.
- 3. Do not use third-party AI bots.**  
To create a transparent environment, AI assistants will be excluded.
- 4. Use the closed caption feature for a live transcript.**  
You can follow along with our presenters.
- 5. The presentation and recording will be posted to the project webpage.**  
Check the project webpage to get access to this and other resources.

# Session **objectives**

- **Meet the team**
- **Introduction to Concur**
- **Share Concur system functions**
- **Provide project timeline, training and help resources**
- **Answer your questions**



# Welcome!

Meet Your Concur Application Administrator



**Laura Korleski**

# Concur Project Team

## Sponsors

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Anne Brown  
*special asst to the VCBA*



Amy Hisler  
*controller*



Jaime Calvao  
*project manager*



Laura Korleski  
*Concur functional administrator*



Heather  
*executive director  
OneIT BA support*



Elizabeth Palian  
*director financial applications support*



Jerri Painter  
*disbursements manager*



Julie Hughes  
*IT business systems analyst*



Gina Smith  
*business & tech. applications specialist*



Lisa Dooley  
*business process analyst*

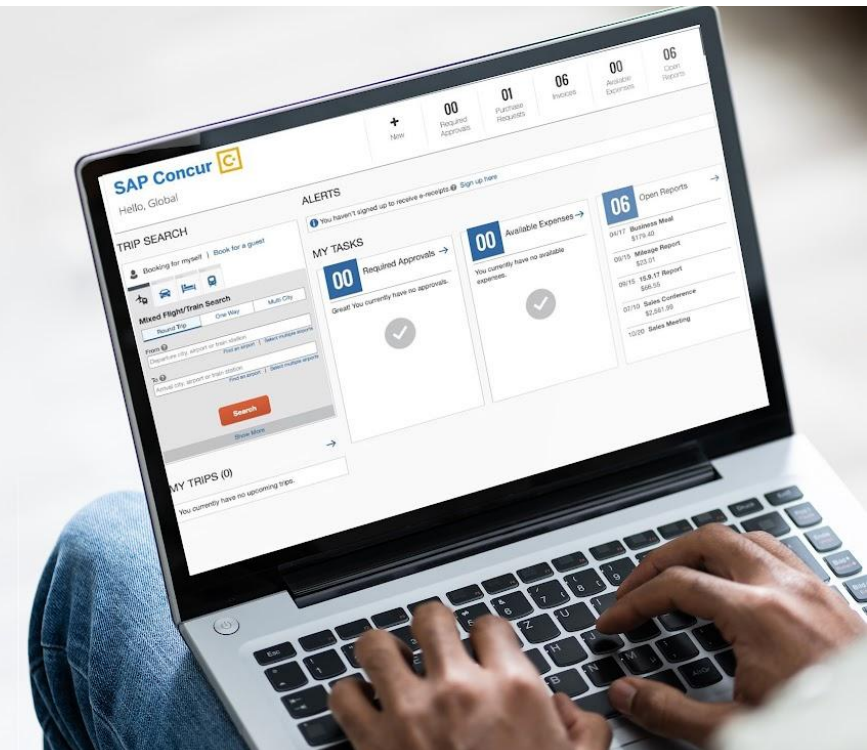


# Introduction to Concur

# What is Concur?

The **Concur Travel and Expense** solution will allow you to request travel and complete your expense reports in one application. There's also an optional booking tool.

- **Goals:** Modernize and streamline travel processes, improve user experience, reduce costs, ensure compliance, and provide real-time visibility into travel expenses.
- **Scope:** Implementation of Concur to replace current paper-heavy travel process.



# Benefits to You - Travel & Expense Reports

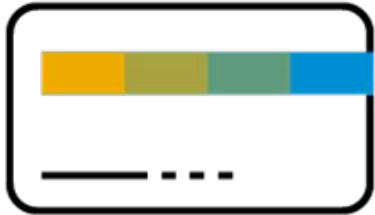


## One seamless paperless system

- Create and submit expense reports for all travel and non-travel transactions
- Automate approval workflows for requests and expense reports
- Option to [book travel](#)
- Get email notifications to keep you up-to-date
- Track your receipts easily
- Calculate mileage
- Calculate your travel allowance
- Receive reimbursements faster



# Benefits to You - Purchasing Card



## Purchasing card (p-card) automation

- All p-card transactions (travel *and* non-travel) will flow through Concur eliminating the Works system
- P-card transactions will be automatically imported
- Streamline your process by pre-populating information from the transaction into an expense report

# Benefits to You - Mobile Friendly




## Mobile capabilities - manage expenses from anywhere


- Create, submit, and approve expense reports using the SAP Concur mobile app (no need for paper!)
- Take a photo to upload your receipts
- Get flexibility by directly syncing the SAP Concur mobile app with the Web version
- Get reimbursed sooner for expenses by starting the workflow sooner

A view from an airplane window showing the wing and a city below at sunset. The sky is a mix of blue and orange, and the city below is bathed in the warm light of the setting sun. The wing of the plane is visible in the foreground, and the city below is a dense collection of buildings and streets.

# Concur **System Functions** at a Glance

# The Concur Home Page - test system

SAP Concur Home ? 



Quick Task Bar

+ New	04 Authorization Requests	85 Available Expenses	01 Open Reports	00 Cash Advances
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- Start a Request
- Start a Report
- New Cash Advance

## Company Notes

[GSA Rates](#)  
This link provides GSA subsistence and Lodging rates

[Read more](#)

## My Tasks

**04** Open Requests →

- 05/23 O-H-I-O\_MAY2024  
\$438.50 — Travel
- 05/16 NOLA-MAY2024  
\$868.50 — Travel

**85** Available Expenses →

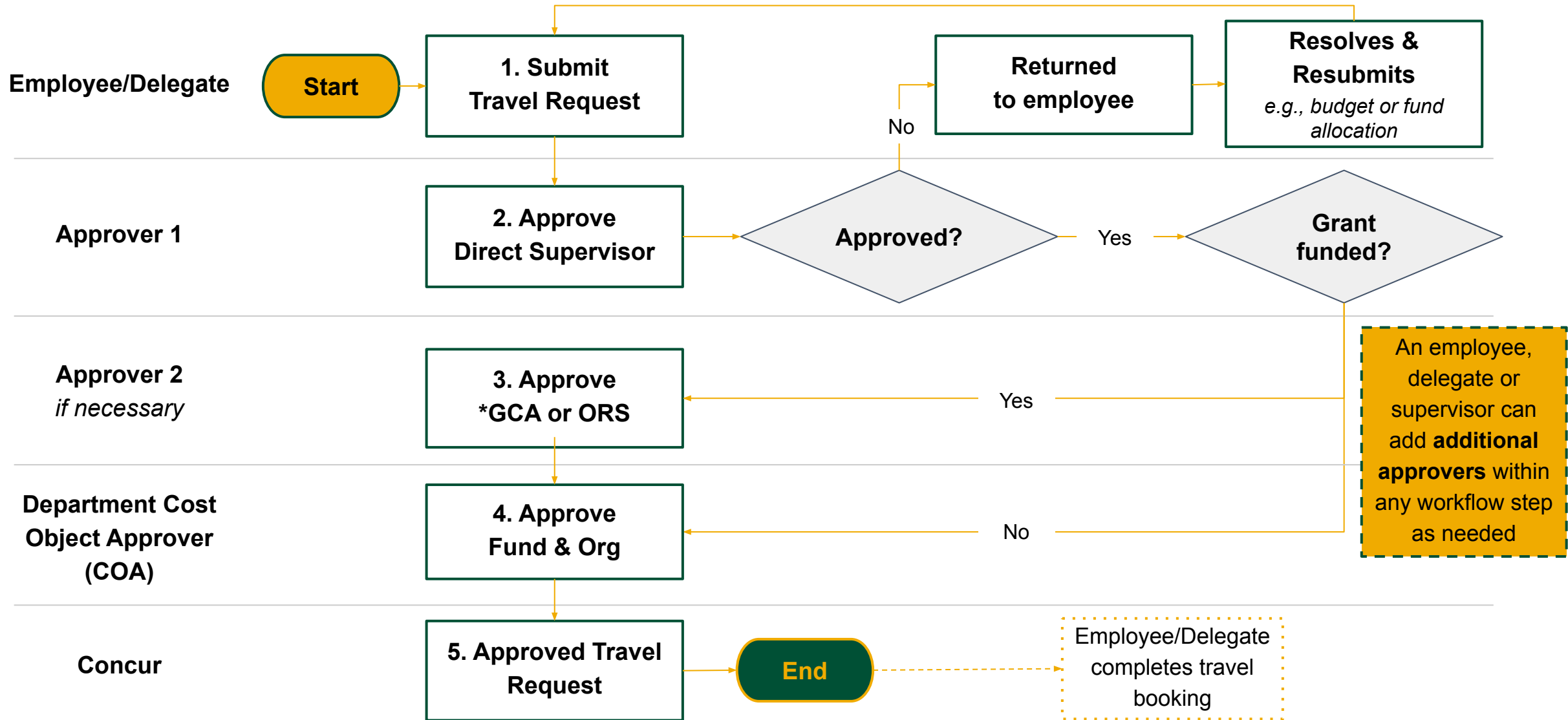
- 01/25 Fax services  
\$40.99
- 01/25 Stationery, Office Supplies, Pri  
\$77.97

**01** Open Reports →

- NC Finance Conference\_MAY24  
\$578.50

# Concur General Travel Request Workflow

Travel request for In-State / Out-of-State




# The Concur Request Form - test system

Summary of Request Information for Request to travel including travel dates and Fund usage.

Create New Request

**\* Required field**

Trip Name *	Trip Start Date *	Trip End Date *
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>
Trip Type *	Employee Type *	Trip Purpose *
<input type="text" value="None Selected"/>	<input type="text" value="None Selected"/>	<input type="text" value="None Selected"/>
Business Reason for Travel *	Destination City *	Destination Country *
<input type="text"/>	<input type="text"/>	<input type="text" value="Search by Country/Region"/>
Does this trip contain personal travel? *	Personal dates of travel	
<input type="text" value="None Selected"/>	<input type="text"/>	
Chart *	Org *	Fund *
<input type="text" value="UNC Charlotte (1) X"/>	<input type="text" value="Bookstore (10700) X"/>	<input type="text" value="Barnes/Noble Campus (139373) X"/>
Additional Information 0/500		
<input type="text"/>		
Comment 0/500		
<input type="text"/>		



# The Concur Request Page - test system

*A summary of expected request expenses. This is still an estimate.*

[Home](#) / [Requests](#) / [Manage Requests](#) / [Conference](#)

## Conference \$2,246.00

[More Actions ▾](#)
[Create Expense Report](#)

Approved | Request ID: 336K

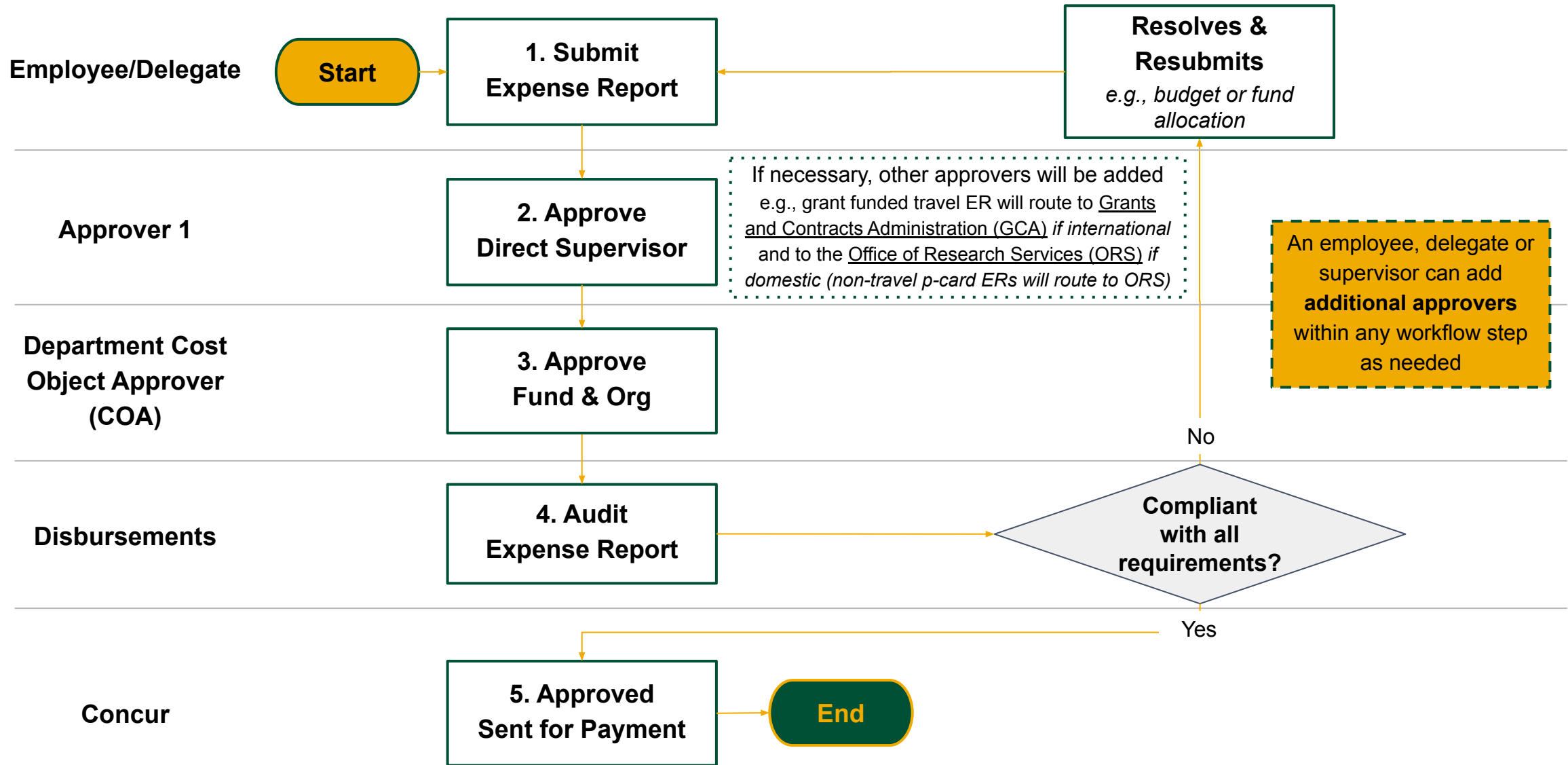
[Request Details ▾](#)
[Print/Share ▾](#)
[Attachments ▾](#)
[Manage Travel Allowance ▾](#)

REPORTS: 1	
Amount	Remaining
\$1,905.96	\$1,233.75

### EXPECTED EXPENSES

Expense type↕↑	Details↕↑	Date↕↔	Amount↕↑	Requested↕↑	
Travel Allowances	Alexandria, Virginia	04/12/2024 - 04/15/2024	\$146.00	\$146.00	▾
<a href="#">Hotel Reservation</a>	Alexandria, Virginia	04/12/2024	\$1,000.00	\$1,000.00	
<a href="#">Airfare</a>	Charlotte (CLT) - Washington (DCA) : Round Trip	04/12/2024	\$350.00	\$350.00	
<a href="#">Registration</a>		04/12/2024	\$650.00	\$650.00	
<a href="#">Taxi/Ground Transportation</a>		04/12/2024	\$100.00	\$100.00	
				<b>\$2,246.00</b>	

# Concur General Expense Report (ER) Workflow





# The Concur Expense Report - test system

Summary of travel Expense Report Information including departure and arrival times

## Report Header

NC Finance Conference\_MAY24 | \$578.50

Trip Name *	Trip Start Date *	Trip End Date *	Trip Type *
NC Finance Conference_MAY24	05/07/2024	05/08/2024	In-State
Employee Type *	Trip Purpose *	Business Reason for Travel *	Does this trip contain personal travel? *
Employee	Conference	CONFERENCE	No
Personal Dates of Travel			

Chart *	1	Org *	2	Fund *	3
UNC Charlotte (1)	X	Financial Services AVC (11400)	X	Financial Services (117510)	X

Additional Information	0/500	Report Currency	Approval Status	Personal Expenses
		US, Dollar	Not Submitted	0
		Amount Not Approved	Amount Approved	Amount Company Paid
		0	578.5	0
Amount Due Company	Amount Due Employee	Amount Due Company Card	Total Amount Claimed	
0	0	0	578.5	

# The Concur Expense Report Summary Page - test system

Summary page of travel Expense Report by Expense type prior to submission

Home / Expense / Manage Expenses / Controller's Conference

Alerts: 4

## Controller's Conference \$451.67

Copy Report Recall Report

Pending Cost Object Approval | Report Number: 79UI8R

### REQUEST

Approved \$543.62 | Remaining \$150.95

Report Details Print/Share Manage Receipts Travel Allowance

View: Standard

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested		
			Cash	Hotel	Marriott Hotels Raleigh, North Carolina	03/08/2024	\$127.65 Itemized	>	⌵
			Cash	Personal Car Mileage		03/07/2024	\$205.02	>	
			University Paid-Direct Bill	Registration	UNC System Office Raleigh, North Carolina	02/15/2024	\$60.00	>	
			Cash	Daily Allowance	Raleigh, North Carolina	01/03/2024	\$16.00	>	
			Cash	Daily Allowance	Raleigh, North Carolina	01/02/2024	\$43.00	>	
							<b>\$451.67</b>		

# The Concur P-card Transaction List Page - test system

A list of all P-card transactions that have not been attached to an expense report.



Expense ▾



AUT

Manage Expenses

**Card Transactions**

Cash Advances

## Company Card Charges

Add Charges To

Italy conference ▾

Add Selected

Delete Selected

Card Activity

\*Test Pcard - 1464 ▾

Time Period

All Unused Charges ▾

TOTAL AMOUNT

**\$2,190.82**

<input type="checkbox"/>	Date	Description	Expense Type	Amount
<input type="checkbox"/>	03/18/2024	HOTEL BALLAST WILMINGTON, NC	Hotel	\$-26.46
<input type="checkbox"/>	03/13/2024	HOTEL BALLAST WILMINGTON, NC	Hotel	\$467.14
<input type="checkbox"/>	11/28/2023	TOWNEPLACE SUITES RALE RALEIGH, NC	Hotel	\$278.60
<input type="checkbox"/>	11/13/2023	OSC CONFERENCE TRAINING 919-707-0714, NC	Undefined	\$30.00
<input type="checkbox"/>	10/06/2023	NCACPA 919-469-1040 NC	Undefined	\$58.00

# The Concur P-card Report - test system

Create New Report

## Summary of P-card Report Information



Create From an Approved Request

\* Required field

Policy \*

\*UNCC-Test Non-Travel PCard

Report Name \*

January NonTravel PCard

Start Date \*

01/01/2024

End Date \*

01/31/2024

Business Purpose \*

Business

Chart \*

UNC Charlotte (1)

1

Org \*

Business Affairs VC (10300)

2

Fund \*

VC Business Affairs (117500)

3

Additional Information

0/500

Comments To/From Approvers/Processors

0/500

Cancel

Create Report

# The Concur P-card Report Page - test system

Where reconciled P-card Transaction reports are summarized prior to submission

Home / Expense / Manage Expenses / January NonTravel

Alerts: 4

## January NonTravel \$381.65

Delete Report

Copy Report

Submit Report

Not Submitted | Report Number: 6THALI

Report Details ▾

Print/Share ▾

Manage Receipts ▾

View Available Receipts

Add Expense

Edit

Delete

Copy

Allocate

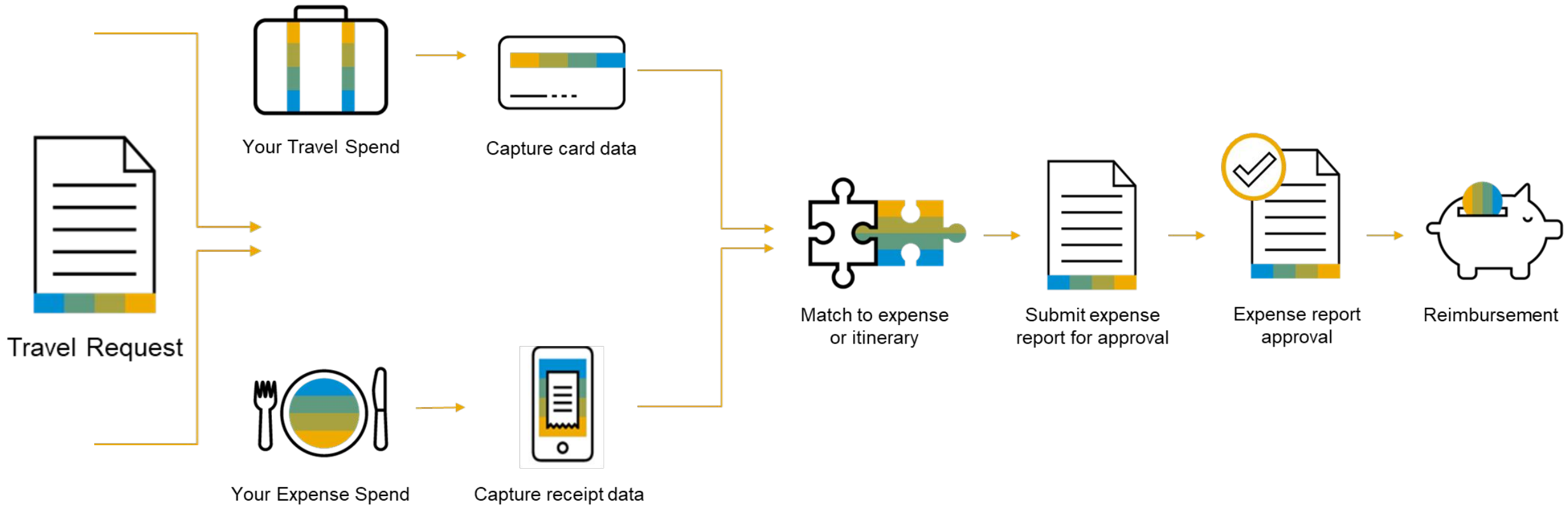
Combine Expenses

Move to ▾

View: Standard ▾

<input type="checkbox"/>	Alerts↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Requested↓↑	
<input type="checkbox"/>	⚠		*Test Pcard	Printing/Photocopying/Stationery	Stationery Stores, Office and Sc Durham, Oregon	01/16/2024	\$85.28	...
<input type="checkbox"/>	⚠		*Test Pcard	Office Supplies/Software	Computer Software Stores Durham, Oregon	01/14/2024	\$93.56	...
<input type="checkbox"/>	⚠		*Test Pcard	Office Supplies/Software	Computer Software Stores Durham, Oregon	01/02/2024	\$93.71	...
<input type="checkbox"/>	⚠		*Test Pcard	Newspapers/Magazines/Books	Computer Software Stores Durham, Oregon	01/02/2024	\$109.10	...

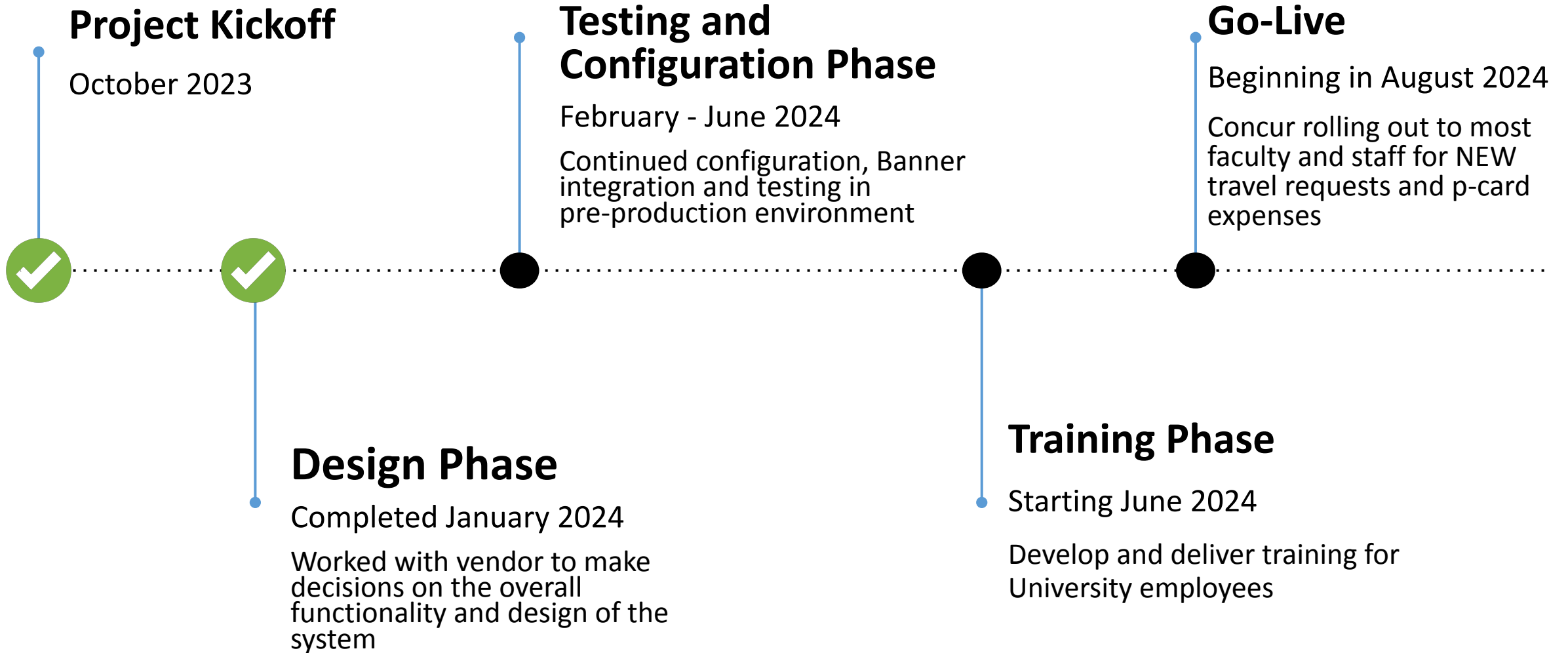
# Your New Travel and Expense Process





Concur **Timeline** + **Resources** + **Next Steps**

# Timeline Overview

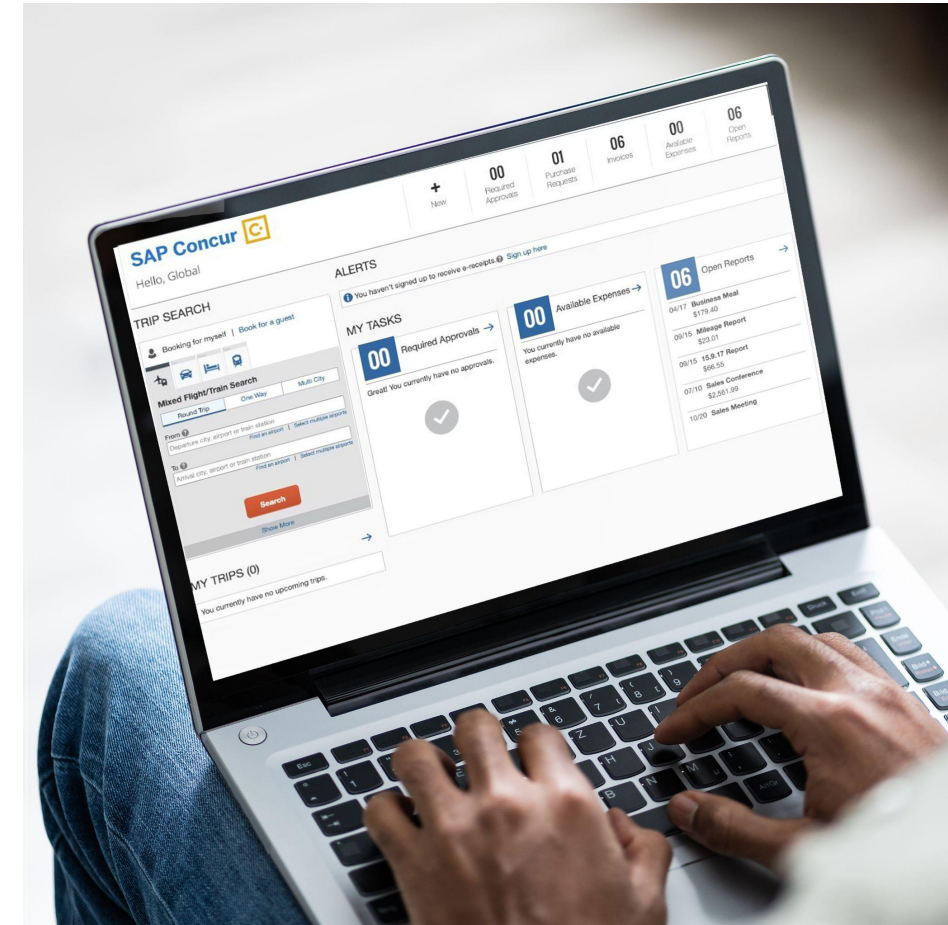




# Concur Training and Help Resources

Summer and Fall 2024

- Multiple training formats
- Town halls
- All faculty and staff welcome and encouraged to attend!
- Ways to stay informed - your resources
  - [Concur project webpage](#)
  - Concur [FAQ Knowledge Base](#)
- Questions and feedback - email [concur-project-group@charlotte.edu](mailto:concur-project-group@charlotte.edu)
- Watch for communications!



A man with glasses and a brown shirt is smiling while looking at his smartphone. He is sitting in a modern office environment with large windows in the background. A yellow chair and a glass of water are visible in the foreground.

Your FAQs Answered!

## Overview - What attendees have been asking

Will Concur replace all disbursement paper forms?

How will I access Concur?

Will mileage reimbursement be processed through Concur?

How will travel already scheduled be handled once Concur goes live?

What should departments be doing to prepare for Concur?

Will Works be available after Concur goes live?

Will paper travel forms be accepted once Concur goes live?

Should employees wait until after Concur goes live to submit future travel requests?

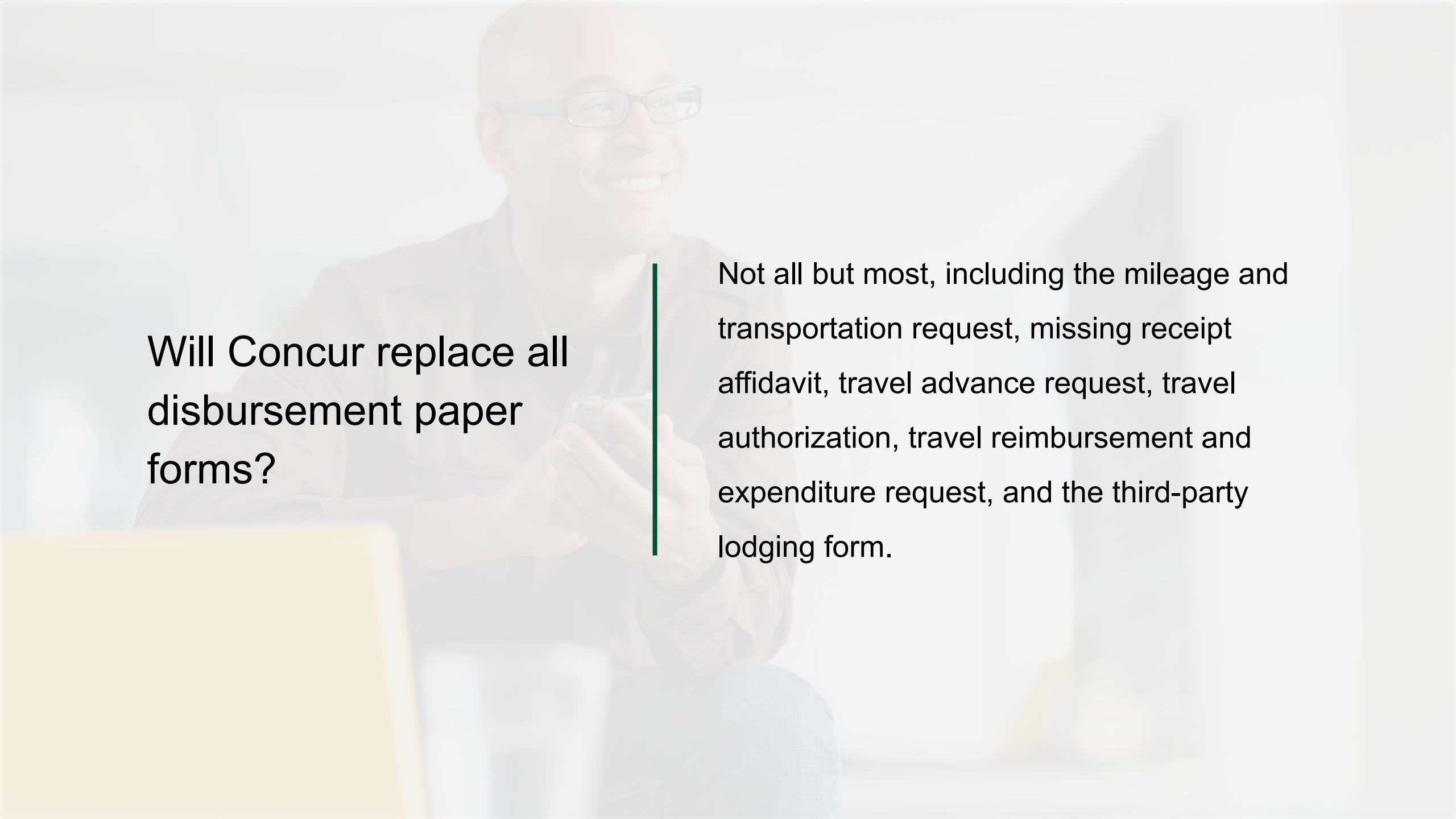
What is a delegate in Concur?

What tasks can a delegate perform in Concur?

Can p-cards be used to book and pay for travel expenses if the traveler is not the cardholder?

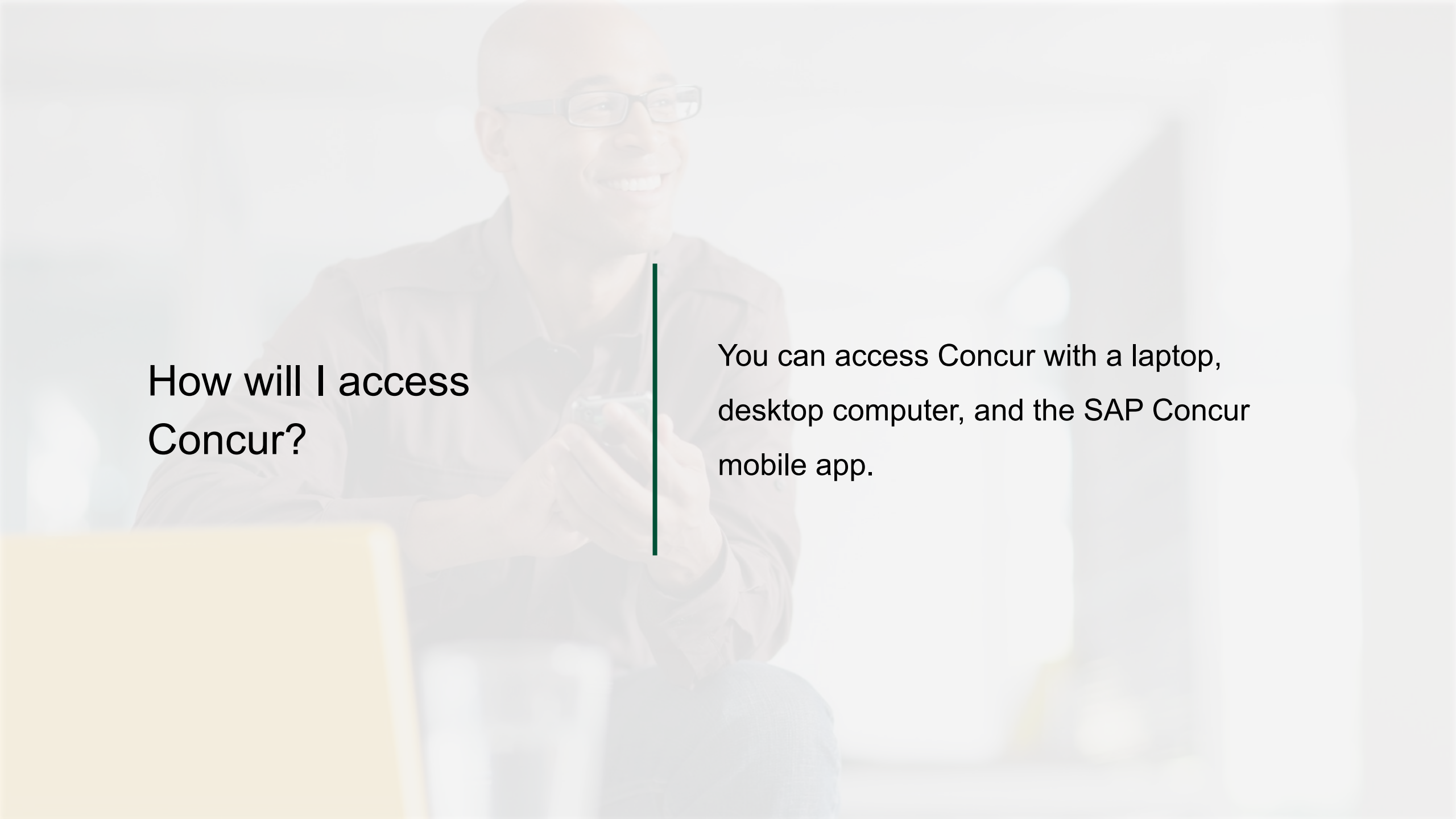
When and what type of Concur training will be available?



A background image of a man with glasses, smiling and looking at a smartphone. The image is faded and serves as a backdrop for the text.

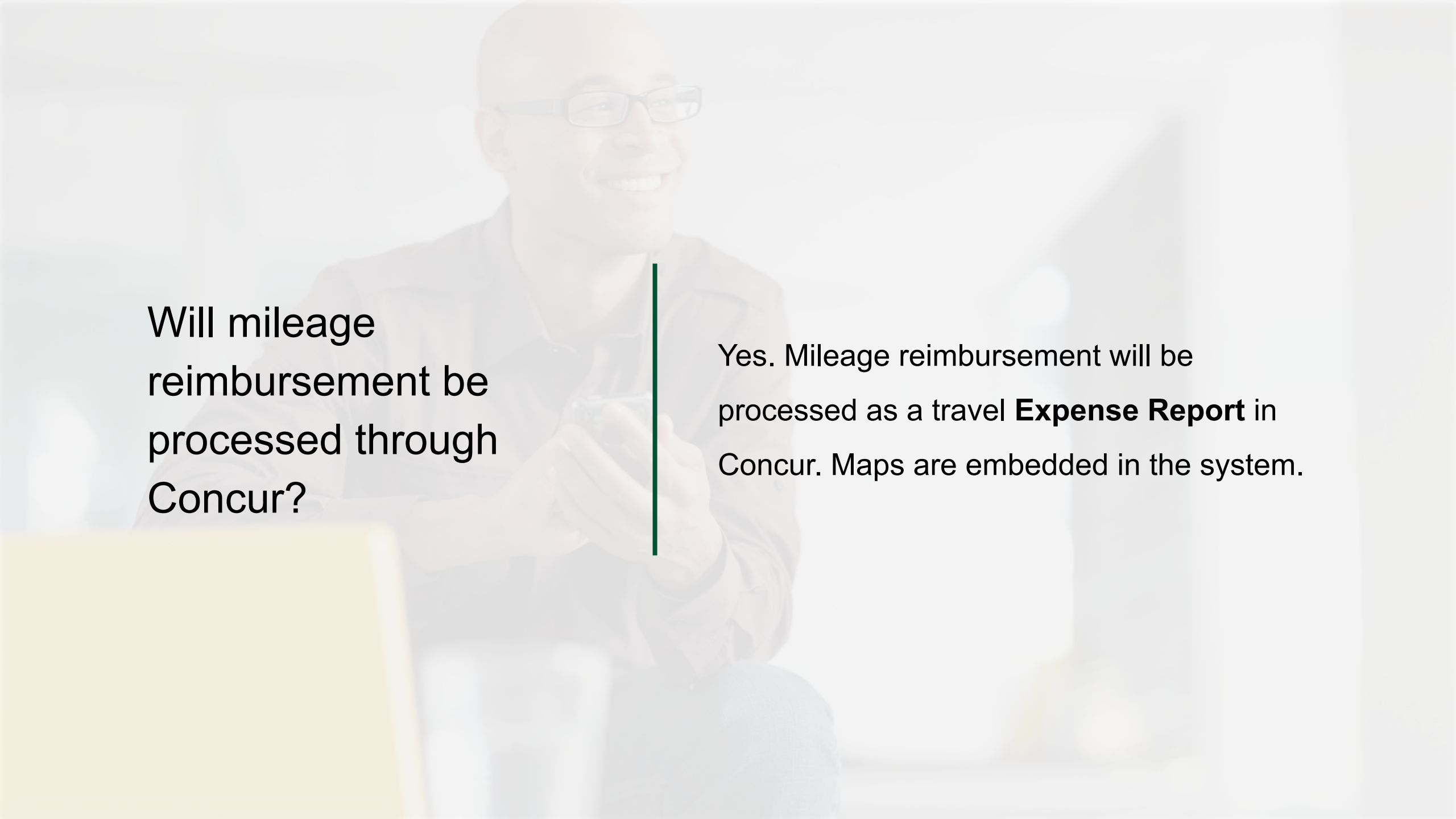
Will Concur replace all  
disbursement paper  
forms?

Not all but most, including the mileage and transportation request, missing receipt affidavit, travel advance request, travel authorization, travel reimbursement and expenditure request, and the third-party lodging form.

A smiling man with glasses is holding a smartphone. He is sitting in a modern office environment. The background is slightly blurred, showing a desk and a chair. The overall tone is professional and positive.

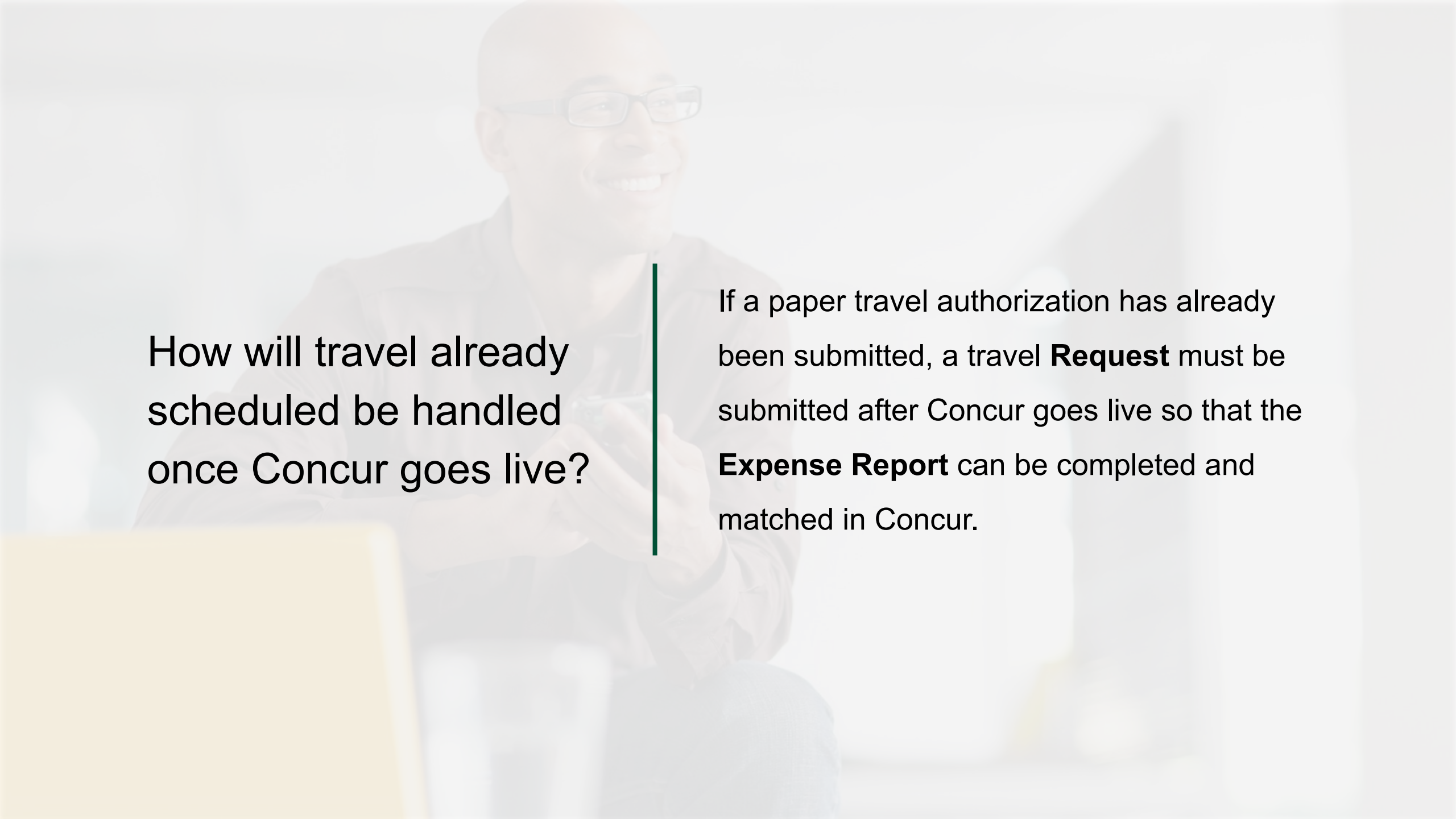
How will I access  
Concur?

You can access Concur with a laptop,  
desktop computer, and the SAP Concur  
mobile app.

A smiling man with glasses is looking at his phone. The background is a blurred office setting with a computer monitor and a yellow chair.

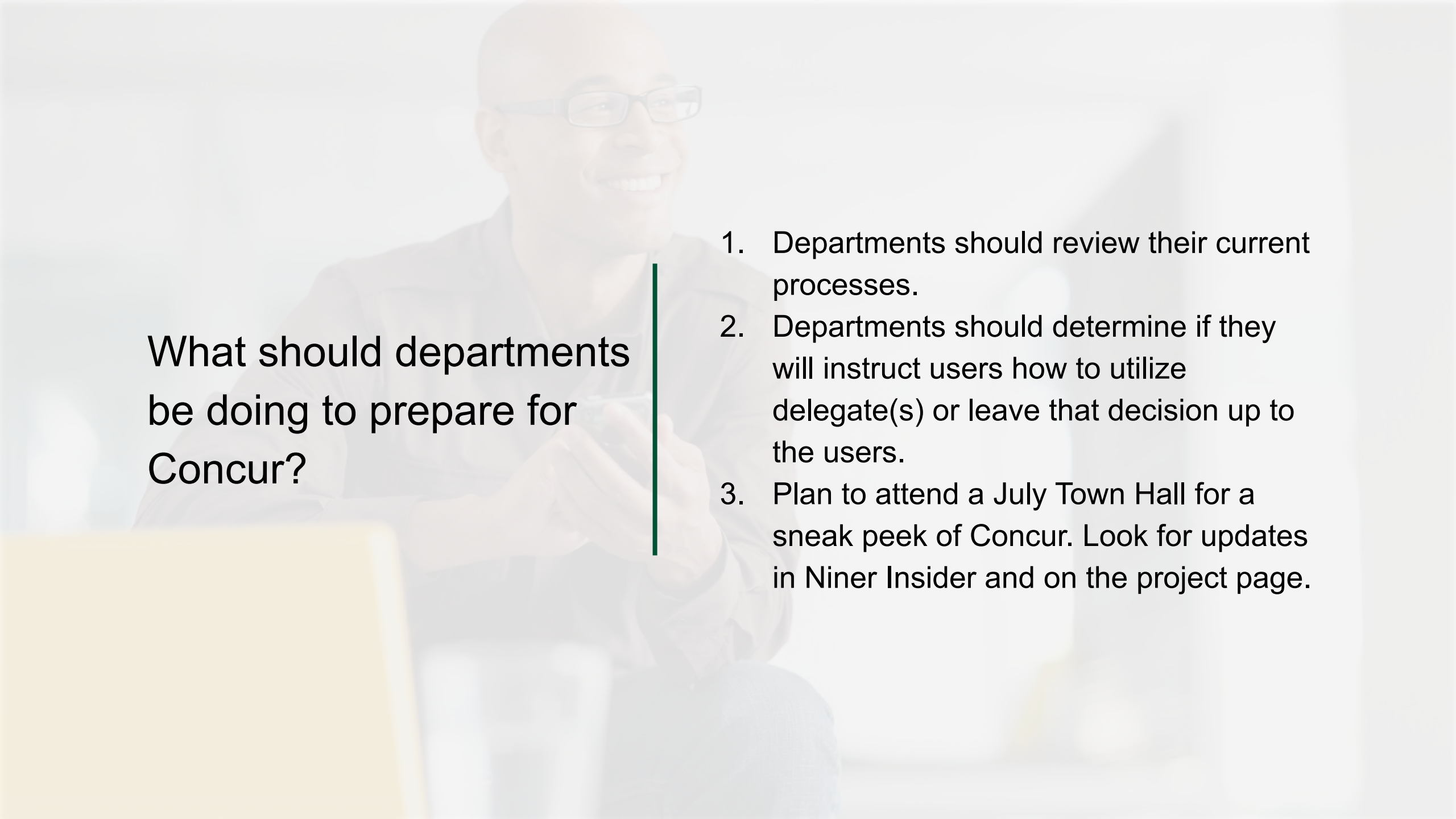
Will mileage reimbursement be processed through Concur?

Yes. Mileage reimbursement will be processed as a travel **Expense Report** in Concur. Maps are embedded in the system.

A background image of a man with glasses, smiling and looking at a smartphone. The image is faded and serves as a backdrop for the text.

How will travel already scheduled be handled once Concur goes live?

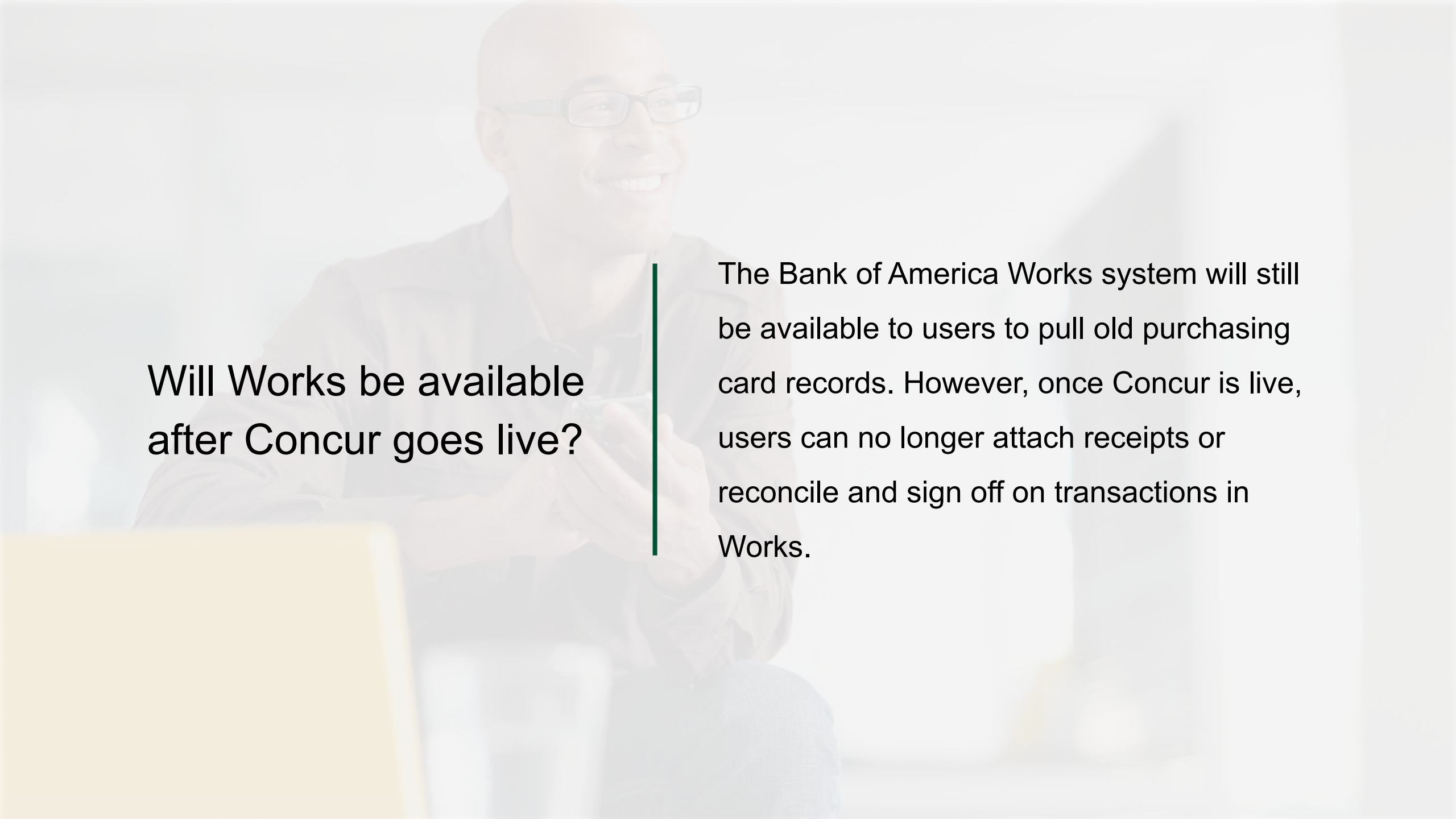
If a paper travel authorization has already been submitted, a travel **Request** must be submitted after Concur goes live so that the **Expense Report** can be completed and matched in Concur.

A background image of a man with glasses, smiling and looking at a smartphone. The image is faded and serves as a backdrop for the text.

## What should departments be doing to prepare for Concur?

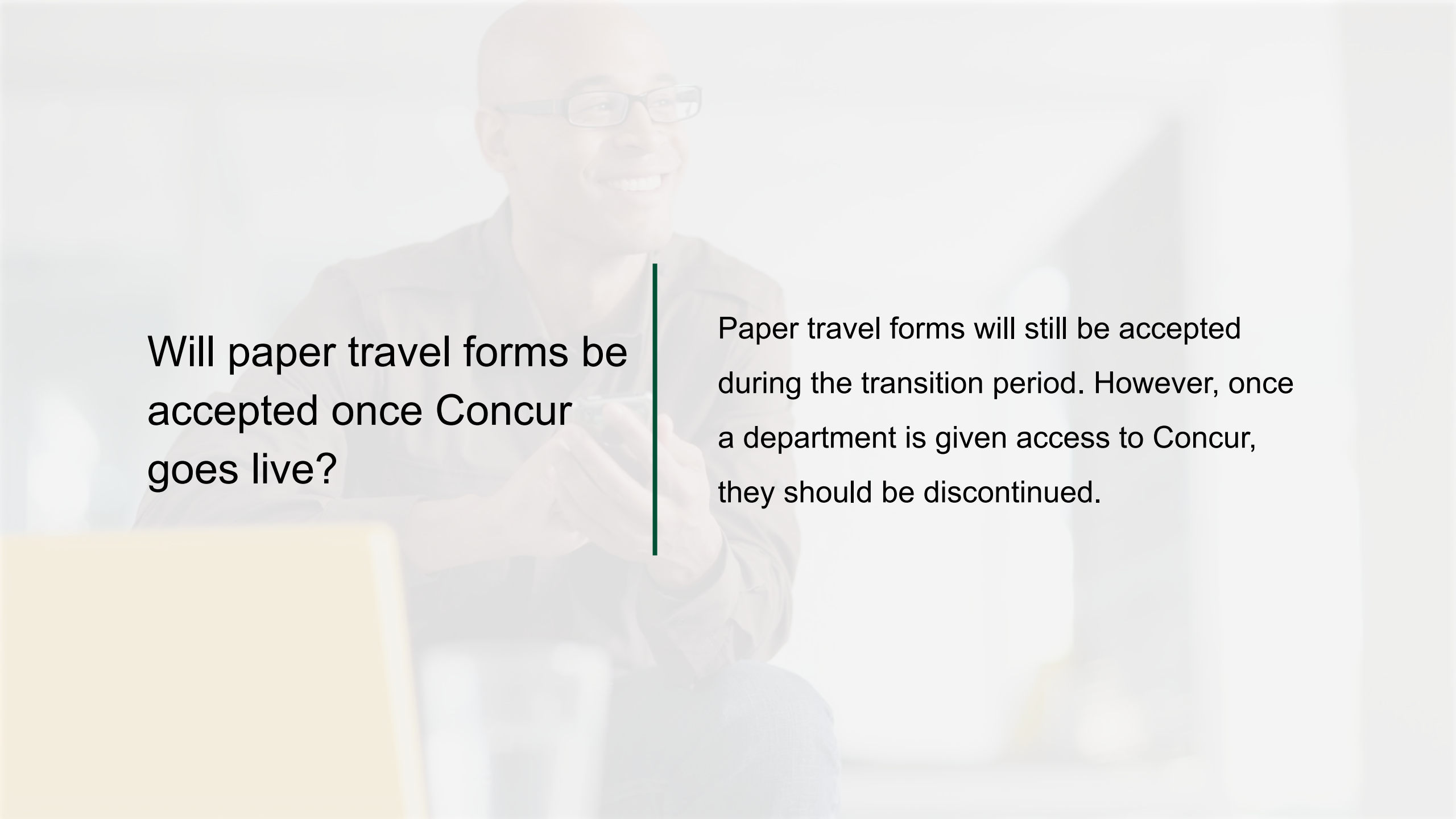
1. Departments should review their current processes.
2. Departments should determine if they will instruct users how to utilize delegate(s) or leave that decision up to the users.
3. Plan to attend a July Town Hall for a sneak peek of Concur. Look for updates in Niner Insider and on the project page.



A background image of a man with glasses, smiling, sitting at a desk with a laptop. The image is faded and serves as a backdrop for the text.

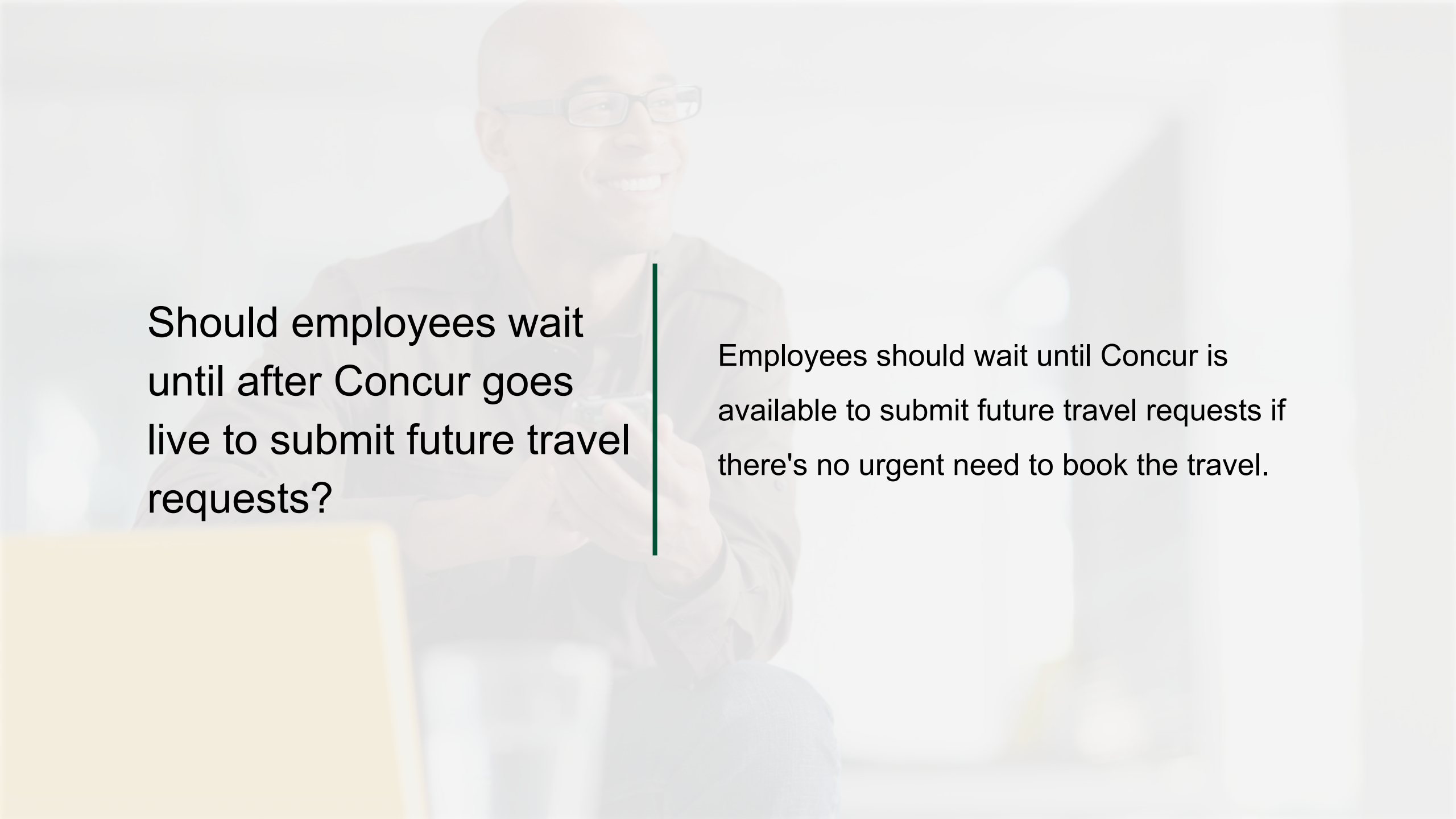
Will Works be available  
after Concur goes live?

The Bank of America Works system will still be available to users to pull old purchasing card records. However, once Concur is live, users can no longer attach receipts or reconcile and sign off on transactions in Works.

A background image of a man with glasses, smiling and looking at a smartphone. The image is faded and serves as a backdrop for the text.


Will paper travel forms be accepted once Concur goes live?

Paper travel forms will still be accepted during the transition period. However, once a department is given access to Concur, they should be discontinued.

A man with glasses and a dark shirt is sitting and smiling while looking at a smartphone. The background is a bright, out-of-focus office setting. A vertical green line is positioned to the right of the question text.

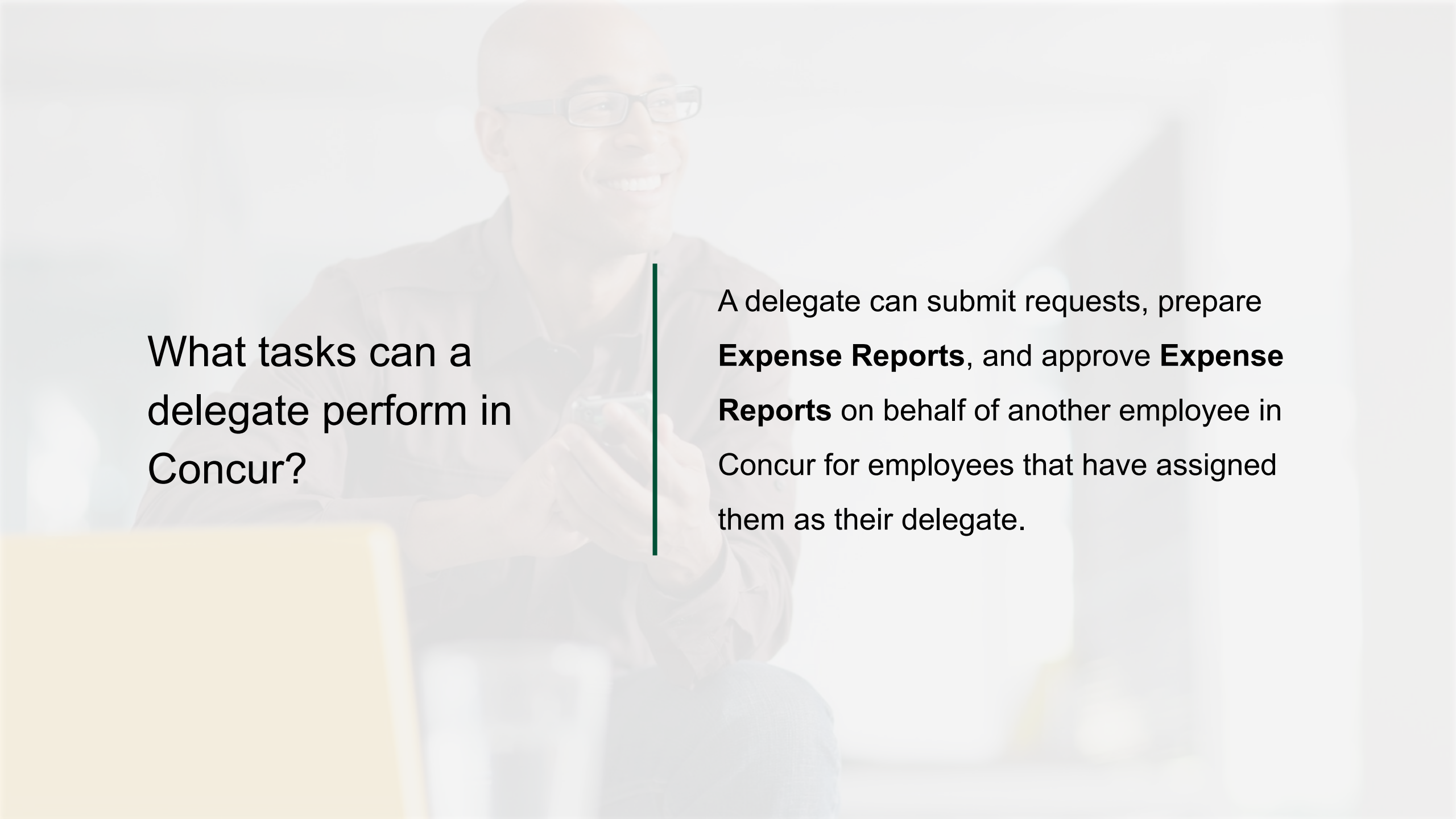
Should employees wait until after Concur goes live to submit future travel requests?

Employees should wait until Concur is available to submit future travel requests if there's no urgent need to book the travel.

A smiling man with glasses is looking at his phone. The background is a blurred office setting with a computer monitor and a yellow chair.

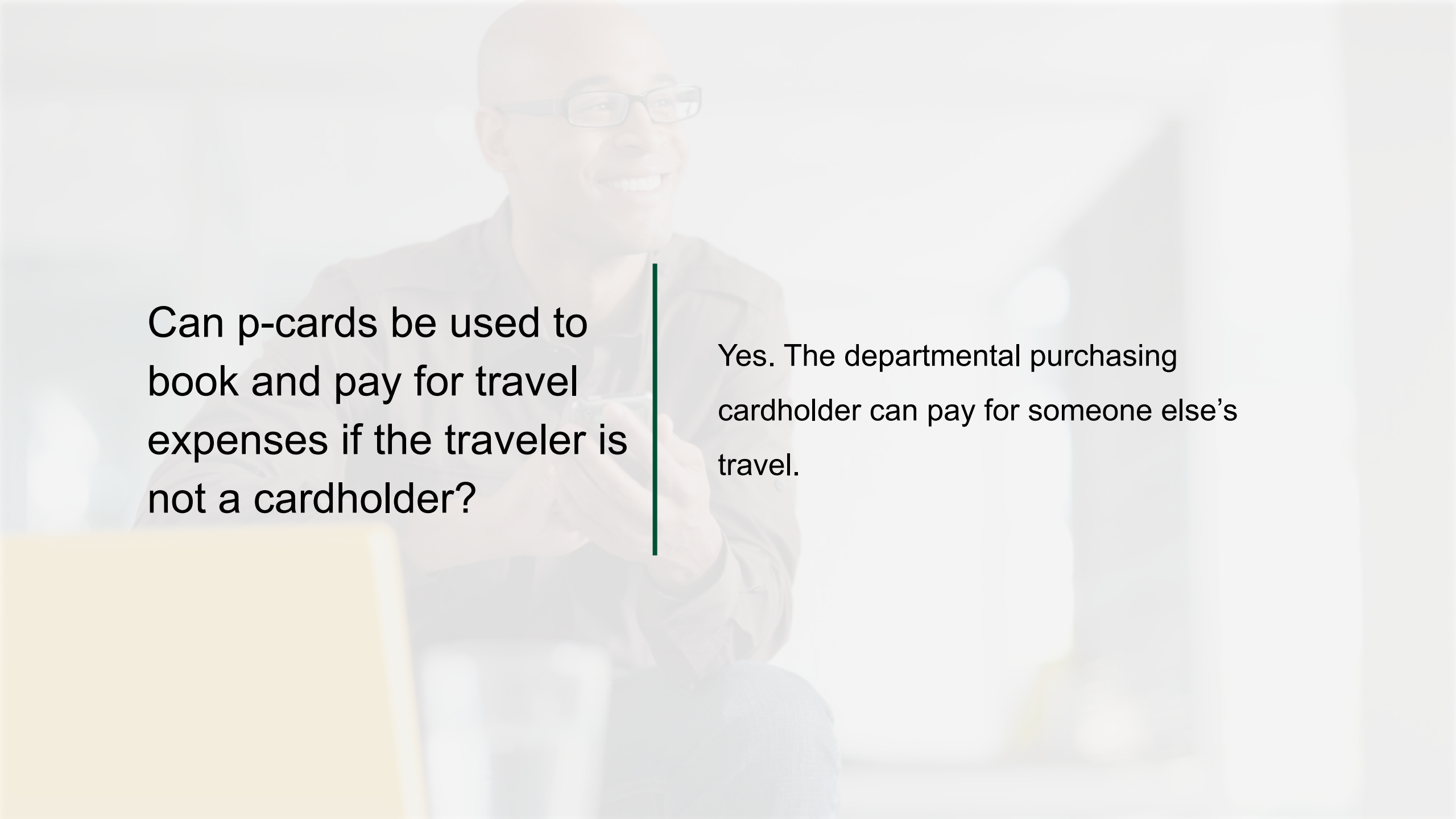
## What is a delegate in Concur?

An employee who has been given responsibility to submit requests, prepare reports and approve reports on behalf of another employee in Concur.

A man with glasses and a dark shirt is smiling and looking at a smartphone. The background is a blurred office setting with a computer monitor and a window.

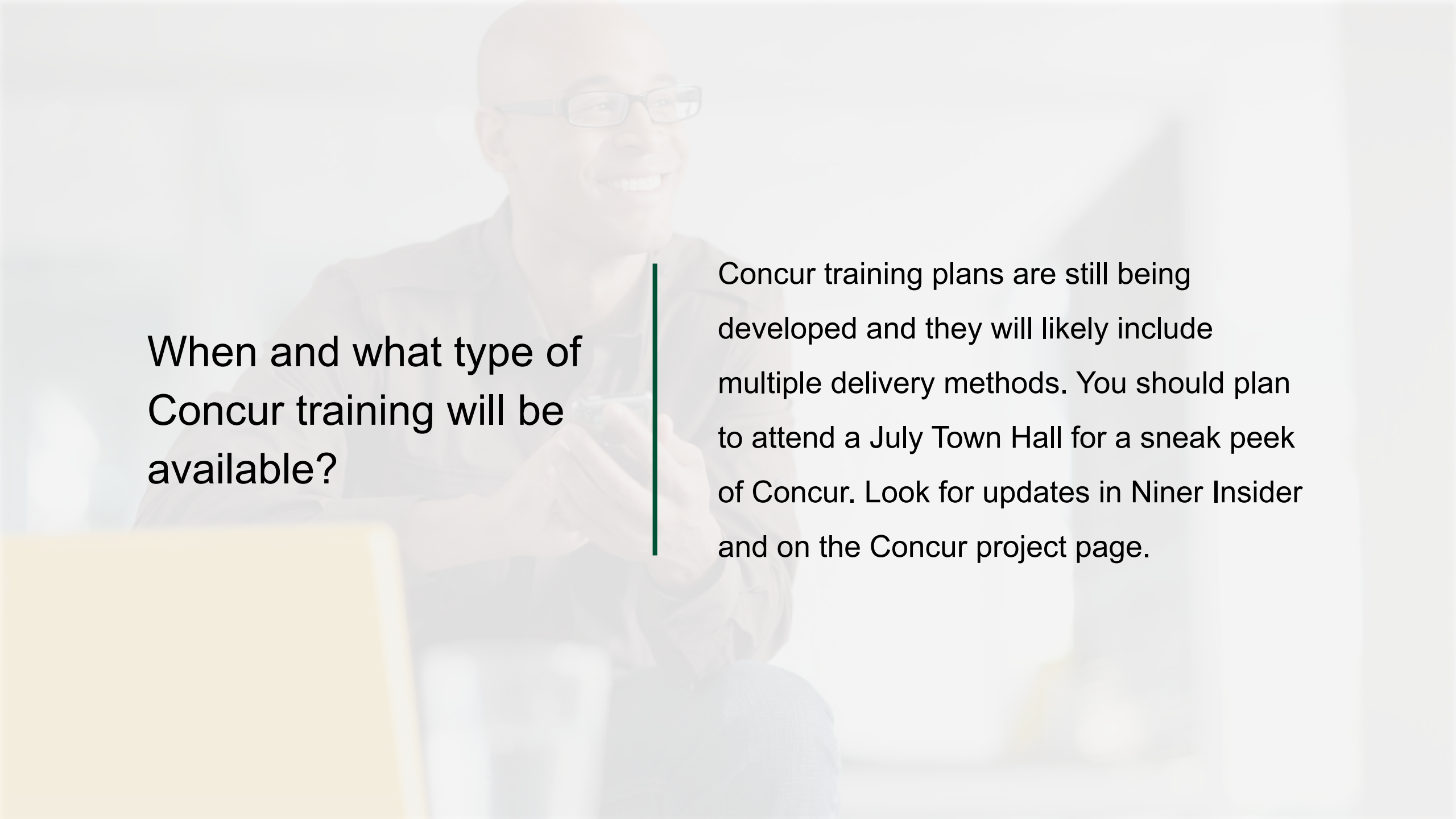
What tasks can a delegate perform in Concur?

A delegate can submit requests, prepare **Expense Reports**, and approve **Expense Reports** on behalf of another employee in Concur for employees that have assigned them as their delegate.

A smiling man with glasses is looking at a smartphone. The background is a blurred office setting with a computer monitor and a yellow chair.

Can p-cards be used to book and pay for travel expenses if the traveler is not a cardholder?

Yes. The departmental purchasing cardholder can pay for someone else's travel.

A background image of a man with glasses, smiling and looking at a smartphone. The image is faded and serves as a backdrop for the text.

When and what type of  
Concur training will be  
available?

Concur training plans are still being developed and they will likely include multiple delivery methods. You should plan to attend a July Town Hall for a sneak peek of Concur. Look for updates in Niner Insider and on the Concur project page.

A man with glasses and a brown shirt is sitting and smiling while looking at his smartphone. He is in an office environment with a yellow chair and a glass of water visible in the foreground. A dark green banner with white text is overlaid on the left side of the image.

Additional Questions?



# Thank You

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*Have more questions? Email [concur-project-group@charlotte.edu](mailto:concur-project-group@charlotte.edu)*