

A large white airplane is seen through a large window in an airport terminal. The foreground shows rows of empty metal airport-style chairs. The text is overlaid on a semi-transparent white box.

CONCUR FOR TRAVELERS TRAINING

The logo for the University of North Carolina Charlotte, featuring a stylized 'f' in a square followed by the university's name.

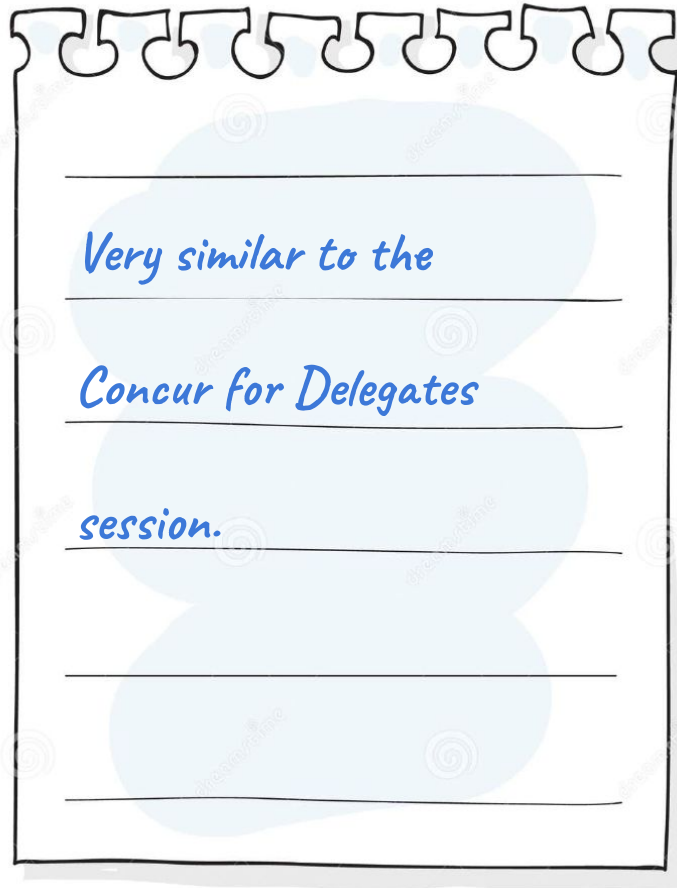
UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Tips for a meaningful and engaging session



- ★ **We don't have access to your camera or microphone.**
We can't see or hear you - make yourself comfortable in your own space!
- ★ **Use the raise hand function to ask questions.**
You can raise your hand to go live with your questions toward the end of the course.
- ★ **Use the closed caption feature for a live transcript.**
You can follow along with our presenters.
- ★ **The presentation and recording will be made available.**
Check the Concur project webpage to get access to this and other resources.

Concur for Travelers Session Topics



- Resources
- Terminology:
 - Request, Report; What is a Delegate
- Homepage
- Profiles
- Travel Request process
- Expense Report process
- Approvals
- Mobile App
- Resources

Concur Resources

Preparing for Concur

If you have questions about Concur or need assistance, please submit this [request form](#).

Additional details and resources are available on the [Concur project page](#).



Concur Training Sessions

Topic	Session Information	L&D Portal Link for Registration
Concur for Delegates	Seven sessions Aug. 8 – 28, 2024	Register in portal for delegate training
Concur for Travelers	Six sessions Aug. 9 – 26, 2024	Register in portal for traveler training
Concur for Purchasing Card Expense Report (Non-travel)	Six sessions Aug. 8 – 28, 2024	Register in portal for Expense Report training
Concur Booking Tool for Travelers	Three sessions Aug. 9 – 22, 2024	Register in portal for Booking for Travelers
Concur Booking Tool for Travel Arrangers	Four sessions Aug. 8 – 26, 2024	Register in portal for Booking for Traveler Arrangers

View [this link](#) for more information on training schedules.

Concur Terms: Request & Report

- Travelers start by requesting formal permission to travel - called a **Travel Request**
 - replaces what is known today as the Travel Authorization (TA)
 - Also referred to as **Authorization Requests** on the Concur Homepage banner, or simply **Requests**
- Traveler's submit an **Expense Report** including documentation for all trip expenses, including those to be reimbursed
 - The **Travel Expense Report** replaces what is known today as the Travel Reimbursement & Expense Report (TRER)
 - Also referred to as **Expense or Report**

Concur Homepage: Taskbar

The screenshot shows the SAP Concur homepage taskbar. At the top left, the SAP Concur logo is displayed next to a 'Home' dropdown menu. On the top right, there are a help icon (question mark) and a user profile icon labeled 'EP'. The main taskbar area contains five cards: a 'New' card with a plus sign, a 'Required Approvals' card showing '00', an 'Authorization Requests' card showing '00', an 'Available Expenses' card showing '00', and an 'Open Reports' card showing '00'. The University of North Carolina Charlotte logo is positioned on the left side of the taskbar.

Concur Homepage: Key Items

SAP Concur Home ▾ ? EP

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

+ New

00 Required Approvals

00 Authorization Requests

00 Available Expenses

00 Open Reports

Home ▾

Home

APPLICATIONS

Requests

Expense

Start a Request

Start a Report

Enter New Reservation

Elizabeth Palian

Act as Another User

Act As ?

Myself

A Delegate for another user who has granted you this permission

Search

Switch

Profile Settings

Sign Out

Your Concur Profile

SAP Concur Home ▾

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

+ New	00 Required Approvals	00 Authorization Requests	00 Available Expenses	00 Open Reports
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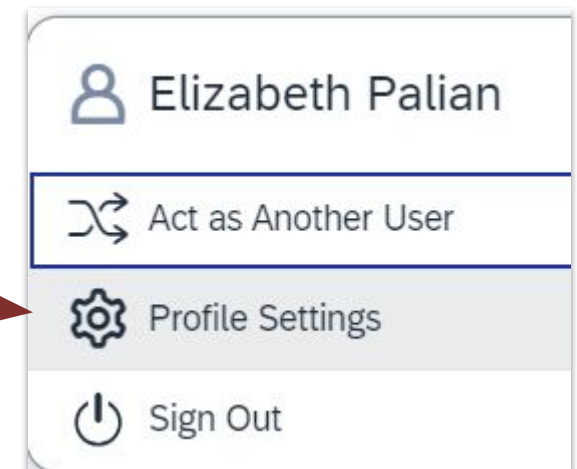
- Some fields populated from Banner
- [Concur Travel and Expense Quick Setup Guide](#)
- 6 Actions to complete a non-travel profile
- 5 Optional Set up Actions if you travel

Login & Access Profile Options

1. Login to Concur at concur.charlotte.edu
2. Enter your SSO NinerNet credentials
3. Select the circle with your initials in the top right hand corner



4. Select Profile Settings



Profile Options: Your Name and Airport Security

****Verify that your names are identical to those on the photo identification that you will be presenting at the airport.***

Title	First Name [Required]	Middle Name [Required]	Preferred Name	Last Name [Required]	Suffix
<input type="text"/>	<input type="text" value="Elizabeth"/>	<input type="text" value="Grider"/> <input type="checkbox"/> No Middle Name	<input type="text" value="Elizabeth"/>	<input type="text" value="Palian"/>	<input type="text"/>

Profile Options

Certain fields (like Manager) are pre populated, and others require completion.

Your profile cannot be saved until you have corrected the issue(s) listed below.

- You must specify a mobile phone.
- You must specify a country calling code for your mobile phone.
- You must specify either a home phone or a work phone.
- Date of Birth is required.
- You must specify your gender.

Profile Options:

Why should I verify my email address?


This verification step is required so that receipts can be emailed to Concur at receipts@concur.com and uploaded into your Available Receipts list.

Enter only the user's verified email address in the Subject line.

Other personal email addresses can be added and verified.

Profile Options: Verify Your Email Address

Select Verify

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	egpalian@charlotte.edu	<input checked="" type="checkbox"/> Not Verified	Verify	Yes	

Verification Email Sent





An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.

OK

Profile Options: Verify Your Email Address

Copy and paste the code from the email into the Enter Code box and click OK

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	egpalian@charlotte.edu	 Check email for code	Resend Cancel	Yes	
		Enter Code	<input type="text"/>	<input type="button" value="OK"/>	

Email Verification Status

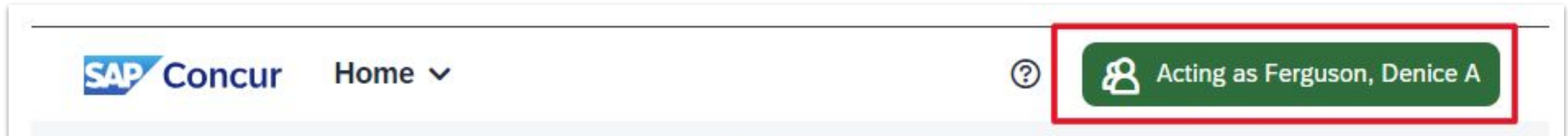


Your email address has been verified.
You may now send receipts to Concur by emailing receipts@concur.com
You may now send trips to Concur by emailing plans@tripit.com

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	egpalian@charlotte.edu	 Verified	Disable Verification	Yes	

Setting up your Delegates

- A delegate in Concur is a user who is granted permission to act on behalf of another user to perform tasks.
- Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request tasks.
- There is no limit to the number of delegates that you can set up.



Add Delegates: Select Tasks

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Request Preferences

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.

Vehicle Configuration

Vehicle Configuration

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

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

Expense Preferences

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.

Concur Mobile Registration

Set up access to Concur on your mobile device

Add Delegates: Select Tasks

- Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request tasks.

Expense Delegates

Delegates

Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.
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"/>	Campbell, Jennifer Jennifer.Campbell@charlotte.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	McLendon, Heather Heather.McLendon@charlotte.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

What Concur Delegates can do

When assigning a delegate in the system, the user determines the tasks a delegate can perform on their behalf. The following tasks can be assigned to a delegate:

- Prepare and/or submit Requests for a traveler.
- Prepare Expense Reports for a traveler or cardholder.
- Approve Requests and/or Expense Reports in place of the system-assigned approver.



What Concur Delegates cannot do on behalf of another user




- Add Delegates
- Complete email verification, it requires receipt of and action from the email that is generated
- Submit an Expense Report, they can **Send for Review** to the user who will need to Submit

E-Receipt Activation

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.

Travel Request Process

**Complete the fields*

Create New Request ✕

* Required field

Trip Name *	Trip Start Date *	Trip End Date *
<input type="text" value="Savannah, GA -"/>	<input data-bbox="955 685 1567 749" type="text" value="07/28/2024"/>	<input data-bbox="1625 685 2237 749" type="text" value="07/31/2024"/>
Trip Type *	Employee Type *	Trip Purpose *
<input data-bbox="275 906 891 963" type="text" value="Out-of-State"/>	<input data-bbox="955 906 1567 963" type="text" value="Employee"/>	<input data-bbox="1625 906 2237 963" type="text" value="Conference"/>
Business Reason for Travel * ?		
<input data-bbox="275 1049 891 1106" type="text" value="Conference participation"/>		

Travel Request Process

**Complete the fields*

Will research (regardless of funding source) be conducted? *	Destination City *	Destination Country *
No ▼	Savannah, Georgia X ▼	UNITED STATES (US) X ▼
Does this trip contain personal travel? *	Personal dates of travel	
No ▼		
Chart 1	Division *	College/Admin *
(1) Chart	(20) Business Affairs (Div) X ▼	(215) Business Affairs IT Support (Adm) X ▼
Department *	Sub-Department *	Fund *
(1130) Financial Systems Support (Dpt) X ▼	(12601) BA Tech-Financial Systems Supp X ▼	(117505) Bus Aff Tech Fin Systems Supp X ▼

Travel Request Process

Select Create Request



The screenshot shows a web form with two text input fields. The first field is labeled 'Additional Information' with a character count of 49/500 and contains the text 'Additional Information box can be used as needed.' The second field is labeled 'Comment' with a character count of 34/500 and contains the text 'Comment box can be used as needed.' At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Request'. A red arrow points from the top right towards the 'Create Request' button, which is also highlighted with a red rectangular border.

Additional Information 49/500
Additional Information box can be used as needed.

Comment 34/500
Comment box can be used as needed.

Cancel Create Request

Travel Request Process

- Notice the Request ID
- Select Add (Expected) Expenses

[Home](#) / [Requests](#) / [Manage Requests](#) / Savannah, GA - 7/28/24

Savannah, GA - 7/28/24

Not Submitted | Request ID: 333R

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

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

Travel Request Process

Expense Types



Expense Types are configured with our account codes and based on the Trip Type selected in the Header, they will post as: in state; out of state; or international.

Add expected expenses and/or travel plans

Search for an expense type

- 01. Travel Expenses
 - 3rd Party Lodging
 - Hotel Reservation
- 02. Transportation
 - Airfare
 - Car Rental
 - Parking
 - Taxi/Ground Transportation
- 03. Meals
 - Student Meals
- 08. Other
 - Registration
- 10. Mileage
 - Personal Car Mileage

Miscellaneous (Pre Approval Required)

Travel Request Process

New Expense: Taxi/Ground Transportation \$100.00

Allocate Cancel Save

* Required field


Expected Transaction Date *	Trip End Date
<input type="text" value="07/28/2024"/>	<input type="text" value="07/31/2024"/>
Estimated Amount *	Currency *
<input type="text" value="100.00"/>	<input type="text" value="US, Dollar (USD)"/>

Comment 42/2000


Save Cancel

Travel Request Process

New Expense: Registration \$175.00 Cancel Save



 Allocate

* Required field

Expected Transaction Date * 

Trip End Date

Estimated Amount *

Currency *  

Comment 0/2000

Save Cancel

Travel Request Process

New Expense: Personal Car Mileage \$0.00

[Allocate](#) [Mileage Calculator](#)

Mileage Calculator ✕

Avoid Tolls Avoid Highways

Waypoints

- A 9201 University City Blvd, Charlotte, 14.7 MI
 Personal
- B 5501 Josh Birmingham Pkwy, Charlo, 16.8 MI
 Personal
- C 9201 University City Blvd, Charlotte, Personal
- D Personal

[Calculate Route](#)

Directions

9201 University City Blvd, Charlotte, NC 28223, USA

14.8 mi. About 23 mins

1. Head west on Library Ln 207 ft
2. Turn right to stay on Library Ln 285 ft
3. Turn left onto Craver Rd 0.3 mi
4. Turn left onto Cameron Blvd 0.6 mi
5. Turn right onto University City Blvd 2.0 mi
6. Take the Interstate 85 S ramp 0.2 mi

<input type="checkbox"/> Deduct Commute	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	31.5 MI

[Add Mileage to Expense](#) [Cancel](#)

Travel Request Process

New Expense: Personal Car Mileage \$21.44 Cancel Save

[Allocate](#) [Mileage Calculator](#)

* Required field

Expected Transaction Date *	Trip End Date	From Location ?
<input type="text" value="07/28/2024"/>	<input type="text" value="07/31/2024"/>	<input type="text" value="9201 University City Blvd, Charlotte, NC 28223, US"/>
To Location ?	Distance *	
<input type="text" value="5501 Josh Birmingham Pkwy, Charlotte, NC 28208, USA"/>	<input type="text" value="32"/>	
Amount ?	Currency	
<input type="text" value="21.44"/>	<input type="text" value="US, Dollar (USD)"/>	

Comment 0/2000

Reimbursement Rates
USD 0.67 per mile

Save Cancel

Travel Request Process

Manage Travel Allowance (previously known as per diem)

Savannah, GA - 7/28/24 \$1,106.44

Not Submitted | Request ID: 333R

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

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

[Add Travel Allowance](#)

The screenshot shows a travel request for Savannah, GA, dated 7/28/24, with a total amount of \$1,106.44. The request is not submitted and has a request ID of 333R. A navigation bar includes links for Request Details, Print/Share, Attachments, and Manage Travel Allowance. The 'Manage Travel Allowance' link is highlighted with a red box, and a button labeled 'Add Travel Allowance' is visible below it. Under the 'EXPECTED EXPENSES' section, there are buttons for Add, Edit, Delete, and Allocate.

Travel Request Process

Travel Allowance

[Itinerary](#) [Technical Information](#)

Itinerary Name * * Required

Savannah, GA - 7/28/24

Detailed Itinerary ? Without overnight ?

Start Location * Charlotte, North Carolina

Start Date * 07/28/2024

Start Time * 12:00 PM

+ Add Destination

Arrival Location * Savannah, Georgia

+ Add Destination

End Location * Charlotte, North Carolina

End Date * 07/31/2024

End Time * 12:00 PM

Next: Adjust your travel allowance [Next](#) [Cancel](#)

Travel Request Process

- Check any meals that will be provided
- Select Finish

Travel Allowance


Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: [Adjustments](#) ▾ [Show Filters](#)

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Reimbursement Amount [?]
All Days Dates: 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sun, 07/28/2024 Savannah, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$48.00
Mon, 07/29/2024 Savannah, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$47.00
Tue, 07/30/2024 Savannah, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$64.00
Wed, 07/31/2024 Savannah, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$48.00
Total:						\$207.00

Travel Request Process



Savannah, GA - 7/28/24 \$1,313.44 

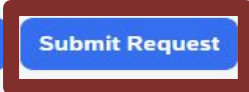
Not Submitted | Request ID: 333R

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

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓	Amount↓↑	Requested↓↑
<input type="checkbox"/>		Hotel Reservation	Savannah, Georgia	07/28/2024	\$600.00	\$600.00
<input type="checkbox"/>		Airfare	Charlotte (CLT) - Savannah (SAV) : Round Trip	07/28/2024	\$210.00	\$210.00
<input type="checkbox"/>		Travel Allowances	Savannah, Georgia	07/28/2024 - 07/31/2024	\$207.00	\$207.00 
<input type="checkbox"/>		Taxi/Ground Transportation		07/28/2024	\$100.00	\$100.00
<input type="checkbox"/>		Registration		07/28/2024	\$175.00	\$175.00
<input type="checkbox"/>		Personal Car Mileage	9201 University City Blvd, Charlotte, NC 28223, US - 5501 Josh Birmingham Pkwy, Charlotte, NC 28208, USA	07/28/2024	\$21.44	\$21.44
						\$1,313.44



Travel Request Process

Savannah, GA - 7/28/24 
07/28/2024 | 333R


\$1,313.44


Submitted

Pending Supervisor Approval
Palian, Elizabeth

Alerts: 2

REQUEST

 INFO: This request was submitted by a delegate/proxy. [Open the Request header](#)

 INFO: This request was created by a delegate/proxy. [Open the Request header](#)

Expense Report Process

- From the Homescreen, Select **+New**, Select **Start a Report**

The screenshot displays the SAP Concur home screen for the University of North Carolina Charlotte. The top navigation bar includes the SAP Concur logo, a 'Home' dropdown menu, a help icon, and the user's initials 'ES'. The main dashboard features the university logo on the left and a central '+ New' button, which is highlighted with a red box. To the right of the '+ New' button are four summary cards: '00 Required Approvals', '00 Authorization Requests', '00 Available Expenses', and '02 Open Reports'. Below the '+ New' button, a dropdown menu is open, showing 'Start a Request' and 'Start a Report', with 'Start a Report' highlighted by a red box. Other elements on the screen include 'Trip Search', 'Co', and a 'Start a Request' button.

Expense Report Process

Create New Report

Create From an Approved Request

Create From an Approved Request?

Creating an expense report from an approved request will discard any information you have already entered in the current window. Are you sure you want to continue?

Go back **Create From an Approved Request**

Available Requests

	Request Name↓↑	Request ID↓↑	Start Date↓↑	End Date↓↑	Cancelled↓↑	Request Total↓↑	A
<input type="radio"/>	Nashville, TN -10/12/2024	333M	10/12/2024	10/16/2024	No	\$2,778.44	\$2
<input type="radio"/>	Savannah, GA - 8/1/24	333X	08/01/2024	08/03/2024	No	\$1,249.44	\$1
<input type="radio"/>	Savannah, GA - 7/28/24	333R	07/28/2024	07/31/2024	No	\$1,313.44	\$1

Cancel **Create Report**

Expense Report Process

[Home](#) / [Requests](#) / [Manage Requests](#) / Nashville, TN -10/12/2024

 Alerts: 2



Nashville, TN -10/12/2024 \$2,778.44

More Actions 

Create Expense Report

Approved | Request ID: 333M

Expense Report Process

Nashville, TN -10/12/2024 \$1,908.82

Ready For Review | [Report Number: ZFKDIO](#)

REQUEST

Approved
\$2,778.44

[Report Details](#) ▼

[Print/Share](#) ▼

[Manage Receipts](#) ▼

[Travel Allowance](#) ▼

[Add Expense](#)

[Edit](#)

[Delete](#)

[Copy](#)

[Allocate](#)

[Combine Expenses](#)

[Move to](#) ▼

Expense Report Process

Available Expenses [+ Upload Receipt](#)

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

[View](#) [Edit](#) [Delete](#) [Combine Expenses](#) [Move to](#) View: All Expenses ▼

<input checked="" type="checkbox"/>	Receipt	Payment Type↓↑	<input type="text" value="New Report"/>	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Amount↓↑	
<input checked="" type="checkbox"/>		Departmental P-Card	Nashville, TN -10/12/2024	Airfare	American Airlines Charlotte, North Carolina	10/12/2024	\$225.60	...

Expense Report Process

← → **Airfare \$225.00**
10/12/2024 | American Airlines

Details Itemizations

Allocate * Required field

Expense Type *
Airfare X ▾

Transaction Date * 10/12/2024 📅 Trip Purpose * Conference ▾

Trip Type * Out-of-State ▾ Employee Type * Employee ▾

Vendor * American Airlines ▾ Destination City * Nashville, Tennessee X ▾

Payment Type *
Departmental P-Card ▾

Amount * 225.00 Currency * US, Dollar (USD) X ▾

Request * 10/12/2024, \$450.00 - Nashville, TN -10/12/2024 ▾

Comment 27/500
dept pcard # 321J (Example)

Expense Report Process

← → **Taxi/Ground Transportation \$150.00** More Actions ▾ Save Expense

10/12/2024 Hide Receipt 📄

Details Itemizations

Allocate * Required field

Expense Type *
Taxi/Ground Transportation X ▾

Transaction Date * 10/12/2024 📅 Trip Purpose * Conference ▾

Trip Type * Out-of-State ▾ Employee Type * Employee ▾

Vendor Name Yellow Cab City of Purchase Nashville, Tennessee X ▾

Payment Type * Out of Pocket ▾

Amount * 78.00 Currency * US, Dollar (USD) X ▾

Request * 10/11/2024, \$150.00 - Nashvill... ▾

Comment 110/500
From Nashville Airport to hotel & back to airport.
Rode with a colleague back to the airport, one way expense.

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.
5MB limit per file.

Expense Report Process

← → **Registration \$200.00** Cancel Delete Expense Save Expense

10/12/2024 | CHEP Hide Receipt

Details | Itemizations

Allocate * Required field

Expense Type *
Registration

Transaction Date *
10/12/2024

Trip Purpose *
Conference

Trip Type *
Out-of-State

Employee Type *
Employee

Vendor Name *
Best Conference Host

City of Purchase *
Nashville, Tennessee

Payment Type *
Out of Pocket

Amount *
200.00

Currency *
US, Dollar (USD)

Request *
10/11/2024, \$400.00 - Nashville, TN -10/12/2024

Comment 35/500
\$200.00 Presenter discount applied.

Receipt

Payment Receipt

Date: [Redacted]

This is a confirmation that we have received your payment for CHEP 2018 conference, 9-13 July 2018 in Sofia, Bulgaria. Please, find the details below:

Conference fee	[Redacted]
Payment date	[Redacted]
Paid with	[Redacted]
Paid amount	[Redacted]
Extra fee	[Redacted]
Payment Method	[Redacted]
Transaction ID	[Redacted]




We are looking forward to seeing you in Sofia.

Best regards,
[Redacted]

38919109-f0dbf742-42ef-11e8-9246-142d9df3b82f.png

Print Open

Expense Report Process

Alerts: 5			
Expense	Hotel	10/16/2024	\$1,223.00
	ACTION: This report cannot be submitted until after the trip end date. View		
Expense	Airfare	10/12/2024	\$225.00
	ACTION: This report cannot be submitted until after the trip end date. View		
Expense	Personal Car Mileage	10/12/2024	\$21.44
	ACTION: This report cannot be submitted until after the trip end date. View		
Expense	Taxi/Ground Transportation	10/12/2024	\$24.38

Expense Report Process

Nashville, TN -10/12/2024 \$1,693.82

Not Submitted | Report Number: ZFKDIO

Delete Report

Copy Report

Submit Report

REQUEST

Approved
\$2,778.44

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↓↑	Comment↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Requested↓↑	
<input type="checkbox"/>	⊗	💬		Departmental P-Card	Hotel	Marriott Hotels Nashville, Tennessee	10/16/2024	\$1,223.00	⋮
<input type="checkbox"/>	⊗	💬	📄	Out of Pocket	Registration	Best Conference Host Nashville, Tennessee	10/12/2024	\$200.00	⋮
<input type="checkbox"/>	⊗	💬	📄	Out of Pocket	Taxi/Ground Transportation	TAXI - TAXI Toronto, Ontario	10/12/2024	\$24.38	⋮
<input type="checkbox"/>	⊗			Out of Pocket	Personal Car Mileage		10/12/2024	\$21.44	⋮
<input type="checkbox"/>	⊗	💬	📄	Departmental P-Card	Airfare	American Airlines Nashville, Tennessee	10/12/2024	\$225.00	⋮
								\$1,693.82	



Expense Report Process

Report Totals ✕

Company Payments

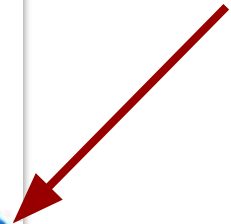
\$245.82 Employee	\$1,448.00 Departmental P-Card
----------------------	-----------------------------------

Employee Payments

\$0.00 Company

Amount Total: \$1,693.82	Due Employee: \$245.82	Owed Company: \$0.00
	Amount Due (Departmental P-Card): \$1,448.00	
Requested Amount: \$1,693.82	Total Paid By Company: \$1,693.82	Total Owed By Employee: \$0.00

[Cancel](#) [Submit Report](#)



Expense Report Process

Nashville, TN -10/12/2024 

08/07/2024

\$1,693.82

Submitted

Pending Supervisor Approval
Heather McLendon

Expense Report Process

Adding Attendees

Student Meals \$215.00

10/12/2024 | Ole Red

Details | Itemizations

Attendees (0) | Allocate

* Required field

Expense Type *
Student Meals

Transaction Date *
10/12/2024

Trip Purpose *
Conference

Trip Type *
Out-of-State

Employee Type *
Employee

Vendor Name
Ole Red

City of Purchase
Nashville, Tennessee

Payment Type *
Out of Pocket

Amount *
215.00

Currency *
US, Dollar (USD)

Comment ?
Hosting students

16/500

Expense Report Process

- Select **Employees**, or add **non-employees**
 - Added attendees will only be added to this User's profile, not to the system for future use

Attendees

Student Meals | \$215.00

Attendees: 4

[Add](#) [Remove](#) [Create Group](#) [Copy from Request](#)

<input type="checkbox"/>	Attendee Name ↑
<input type="checkbox"/>	Bonnie Cone
<input type="checkbox"/>	Charlotte Mecklenburg
<input type="checkbox"/>	Norm Niner
<input type="checkbox"/>	Reese Colvard

Expense Report Process

Allocate

Allocate

Expenses: 1 | \$215.00 | [View Allocation Group](#)

Percent Amount

Amount
\$215.00

Allocated \$215.00
100%

Remaining \$0.00
0%

Default Allocation

Code
1-20-215-1130-12601-117505

Percent %
0

Add Edit Remove **Save as Favorite**

<input type="checkbox"/>	Chart↓↑	Division↓↑	College/Admin↓↑	Department↓↑	Sub-Department↓↑	Fund↓↑	Code↑=	Percent %
<input type="checkbox"/>	Chart	Business Affairs (Div)	Business Affairs IT Support (Adm)	Financial Systems Support (Dpt)	BA Tech-Financial Systems Support	Bus Aff Tech Fin Systems IFLX	1-20-215-1130-12601-117513	100

Expense Report Process

Nashville, TN -10/12/2024 \$1,908.82 Delete Report Copy Report Not Ready For Review

Ready For Review | Report Number: ZFKDIO

REQUEST
Approved
\$2,778.44

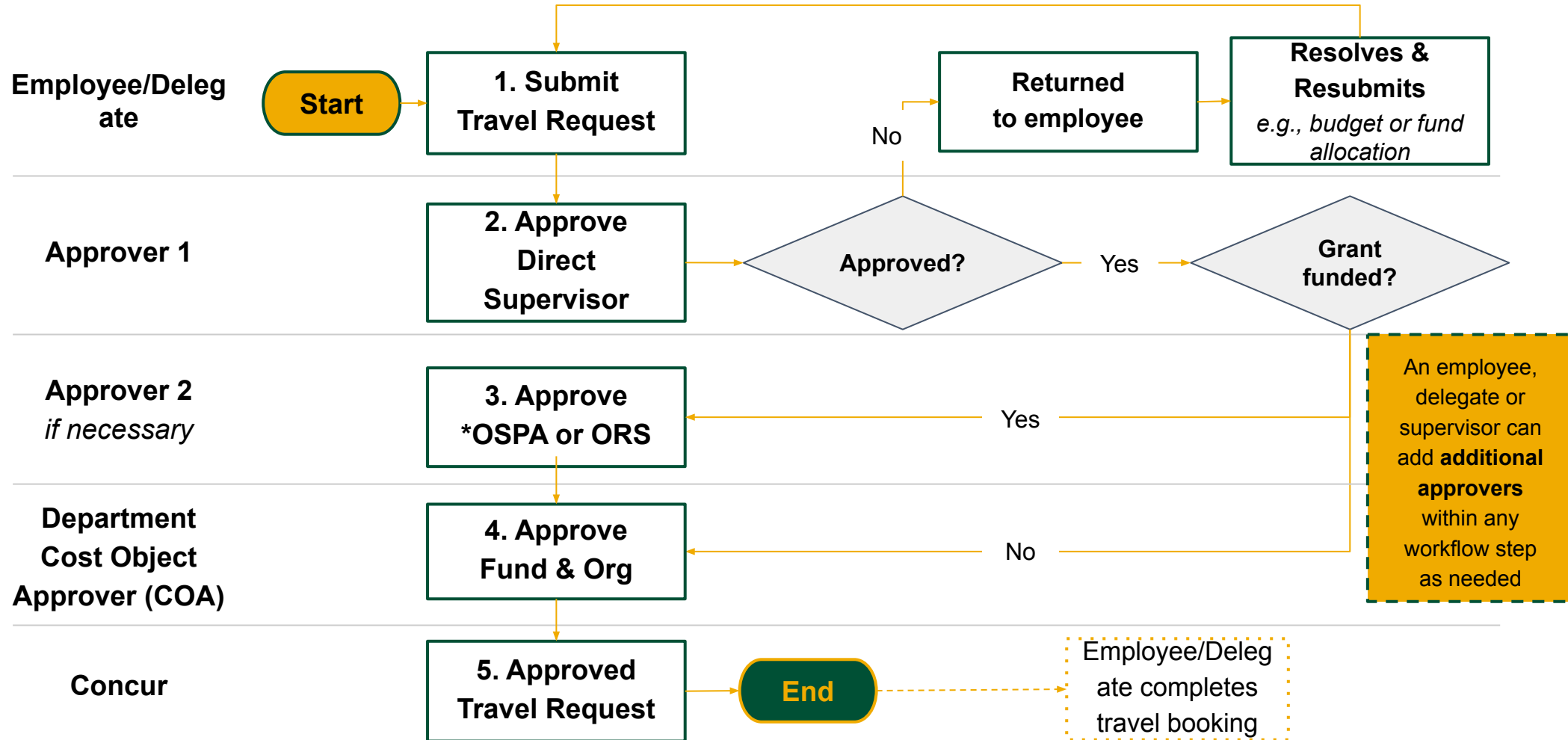
Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾ View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾ View: Standard ▾

<input type="checkbox"/>	Alerts↑↓	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↓↑	Requested↑↓	
<input type="checkbox"/>	✖	💬		Departmental P-Card	Hotel	Marriott Hotels Nashville, Tennessee	10/16/2024	\$1,223.00	...
<input type="checkbox"/>	✖	💬		Out of Pocket	Student Meals Attendees (4)	Ole Red Nashville, Tennessee	10/12/2024	\$215.00 Allocated	...
<input type="checkbox"/>	✖	💬		Out of Pocket	Registration	Best Conference Host Nashville, Tennessee	10/12/2024	\$200.00	...
<input type="checkbox"/>	✖	💬		Out of Pocket	Taxi/Ground Transportation	TAXI - TAXI Toronto, Ontario	10/12/2024	\$24.38	...
<input type="checkbox"/>	✖			Out of Pocket	Personal Car Mileage		10/12/2024	\$21.44	...
<input type="checkbox"/>	✖	💬		Departmental P-Card	Airfare	American Airlines Nashville, Tennessee	10/12/2024	\$225.00	...
								\$1,908.82	

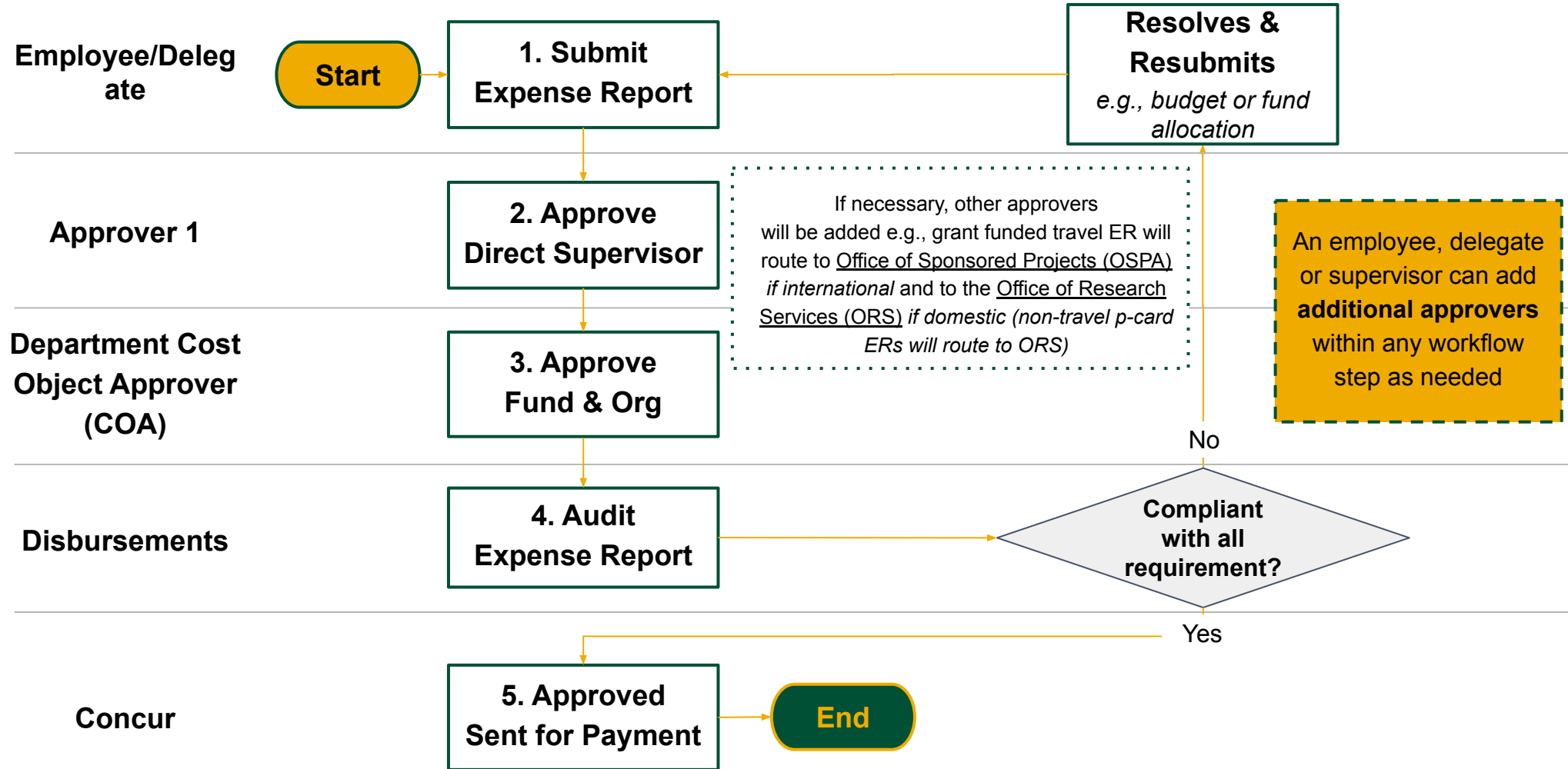
Request Approval Workflow

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



*Office of Sponsored Projects Administration or Office of Research Services

Expense Report Approval Workflow



Request & Travel Expense Approval Workflow

- Supervisors are included in request and expense approval workflow
- Since there's no specific training for supervisors, help spread the message by bringing this to the attention of supervisors
- Approvers may find the Mobile App very helpful for Approvals

[Approvers Guide](#)

Concur Mobile App

1. Go to the App Store or Google Play directly on your phone and search “SAP Concur”
2. Select **Sign In**
3. Type **CLT49** in the Username, verified email address or SSO code field
4. Select **Next**
5. Enter your SSO credentials
6. Respond to the Duo multi-factor authentication prompt

Note: If you enter your email address in Step 3, after selecting Next, you’ll need to select UNC Charlotte SSO and then enter your SSO credentials.

Downloading and Signing In to the Concur Mobile App

Concur Resources

Preparing for Concur

If you have questions about Concur or need assistance, please submit this [request form](#).

Additional details and resources are available on the [Concur project page](#).



Knowledge Base

The screenshot shows the University of North Carolina Charlotte Knowledge Base interface. At the top, there is a dark green header with the university logo and name on the left, a search bar with the text "Search the client portal" in the center, and a user profile icon for "Elizabeth Palian" on the right. Below the header is a navigation menu with links for Home, Students, Faculty & Staff, System Status, Services, and Knowledge Base. The main content area is titled "Search" and shows "138 Results". A search bar contains the text "Concur Delegate". Below the search bar, three search results are displayed, each with a title, breadcrumb trail, and a green "Approved" badge. The first result is "Act as a Delegate in Concur", the second is "Adding or Removing Request and Expense Delegates", and the third is "Can a temporary delegate be assigned in Concur?".

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

Search the client portal Elizabeth Palian

Home Students Faculty & Staff System Status Services Knowledge Base

Search 138 Results

Concur Delegate

Act as a Delegate in Concur Approved

Knowledge Base / Financial Services / University Finance & HR Systems / Concur / Concur Guidance / Delegates

concur-delegates ...). Process You can also watch this brief video tutorial on acting as a **delegate** in Concur. Log into concur.charlotte.edu to begin. Step One: Select the Profile icon On the home page, select the

Adding or Removing Request and Expense Delegates Approved

Knowledge Base / Financial Services / University Finance & HR Systems / Concur / Concur Guidance / Delegates

concur-delegates ... Overview This guidance explains how to add, edit, or remove Request and Expense **delegates** who can have visibility to your travel and expenses in Concur and can act on your behalf. A **delegate**

Can a temporary delegate be assigned in Concur? Approved

Knowledge Base / Financial Services / University Finance & HR Systems / Concur / Using Concur / Delegates

concur ... Yes, users can specify a start and end date for temporary **delegate** assignments in Concur.

Knowledge Base Acting as a Delegate

- [Concur Travel and Expense Quick Setup Guide](#)
- [Creating a Request to Travel](#)
- [Emailing Receipts to Concur](#)
- [Creating a Travel Expense Report](#)
- [Downloading and Signing in to the Concur Mobile App](#)

Thank you!



Need assistance with Concur?

Submit a [service request form](#)

