CONCUR FOR TRAVELERS TRAINING

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

Tips for a meaningful and engaging session

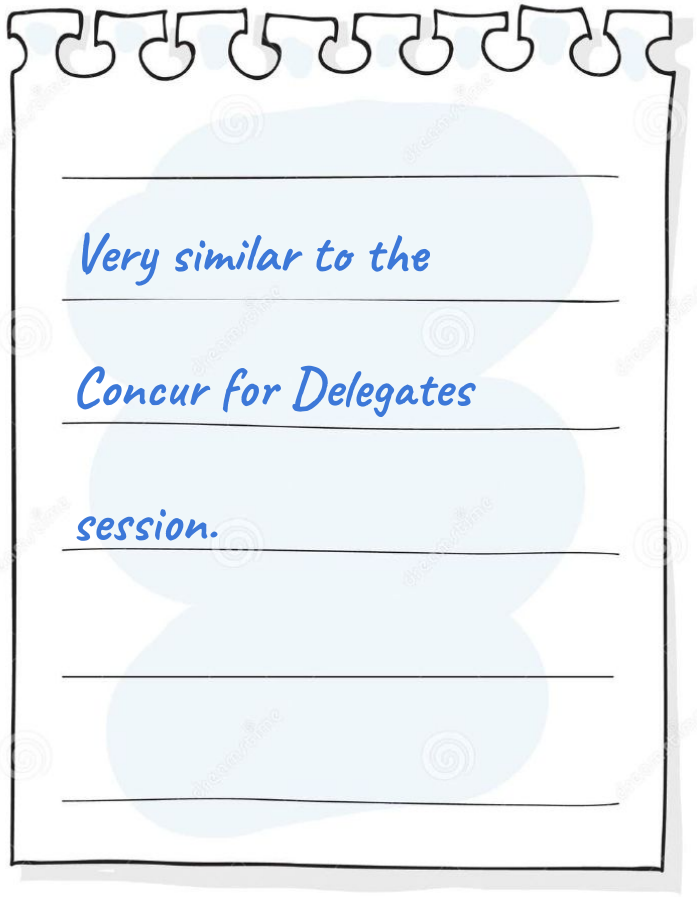
★ **We don’t have access to your camera or microphone.**
We can’t see or hear you - make yourself comfortable in your own space!

★ **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

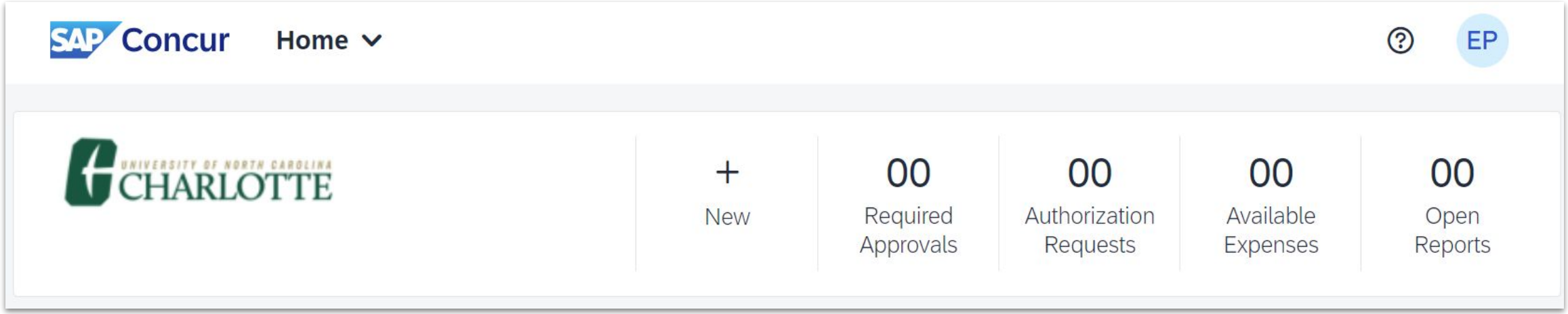
View this link for more information on training schedules.

Concur Terms: Request & Report

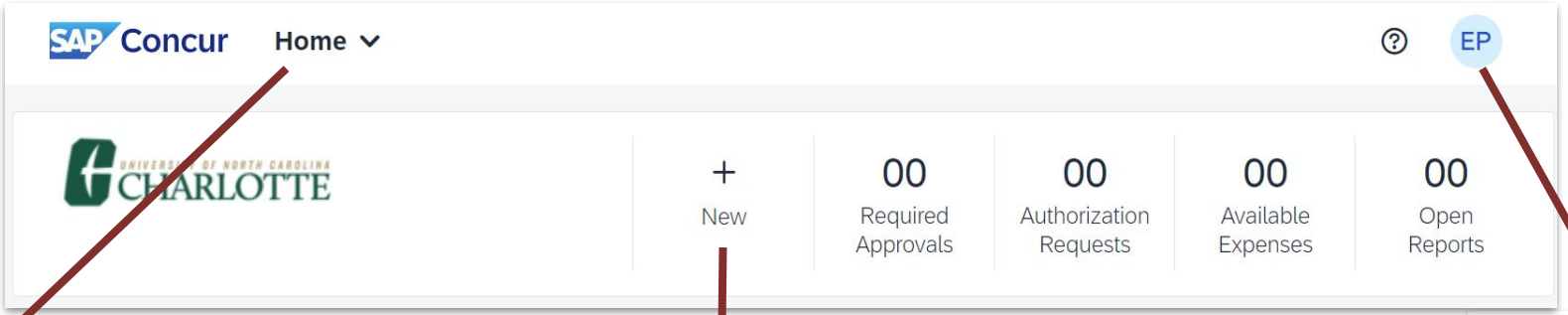
- Travelers start by requesting formal permission to travel - called a **Travel Request**
  - replaces what is known today as the Travel Authorization (TA)
  - Also referred to as **Authorization Requests** on the Concur Homepage banner, or simply **Requests**

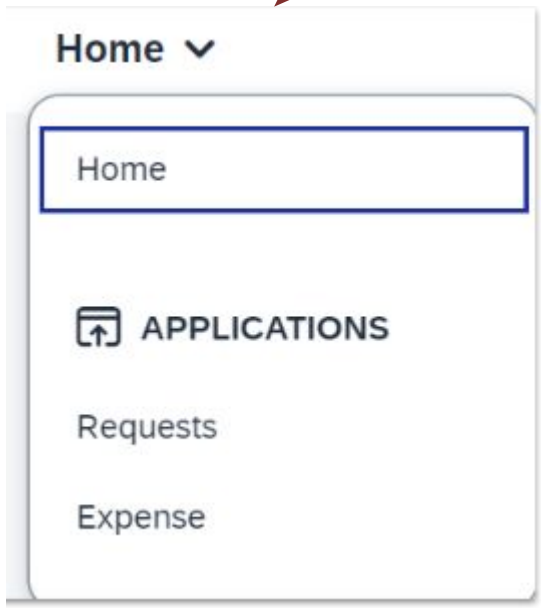
- Traveler's submit an **Expense Report** including documentation for all trip expenses, including those to be reimbursed
  - The **Travel Expense Report** replaces what is known today as the Travel Reimbursement & Expense Report (TRER)
  - Also referred to as **Expense** or **Report**

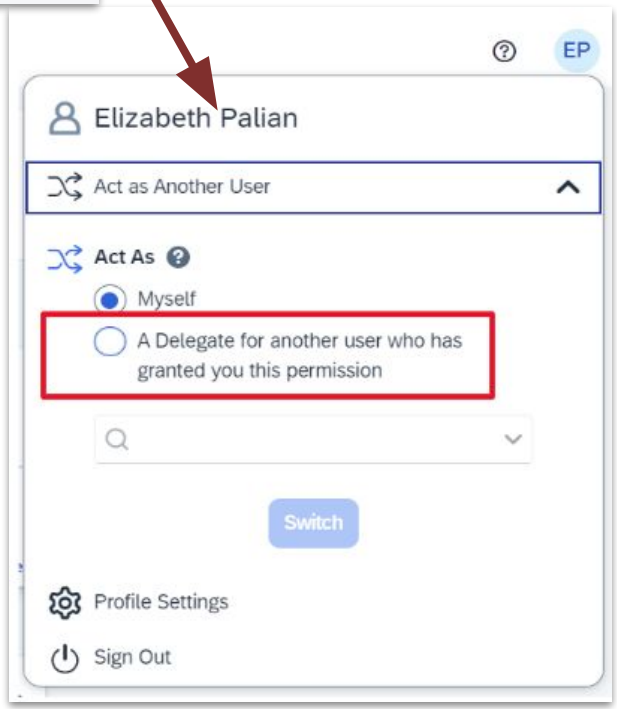
Concur Homepage: Taskbar



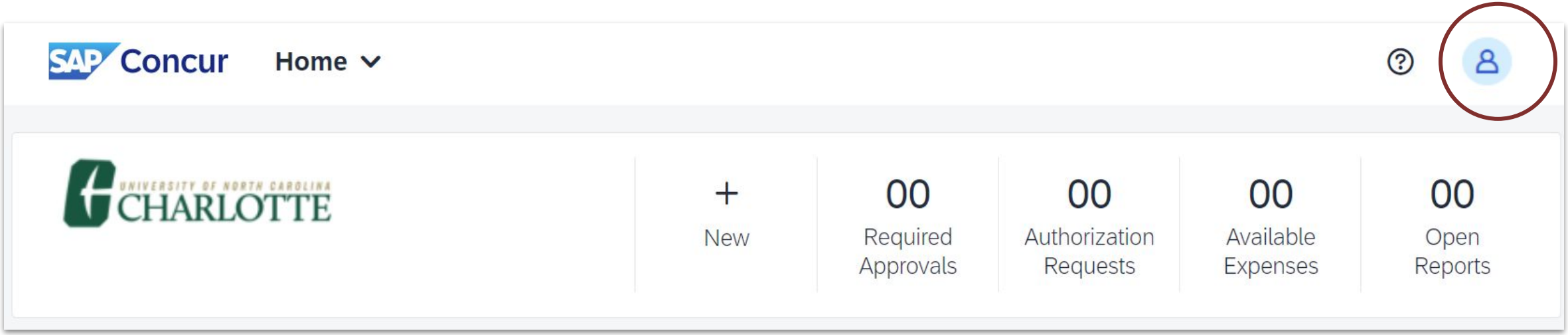
Concur Homepage: Key Items







Your Concur Profile

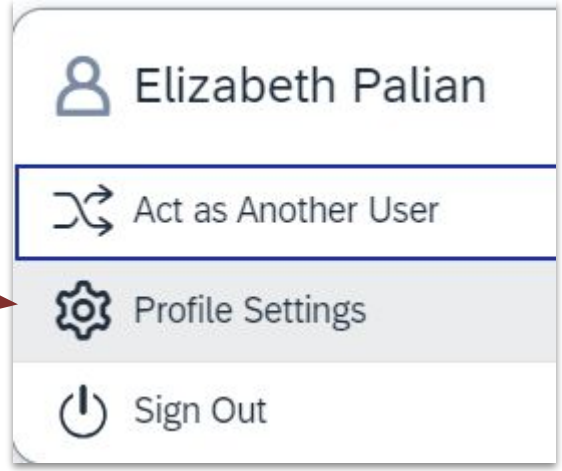


- Some fields populated from Banner
- Concur Travel and Expense Quick Setup Guide
- 6 Actions to complete a non-travel profile
- 5 Optional Set up Actions if you travel

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

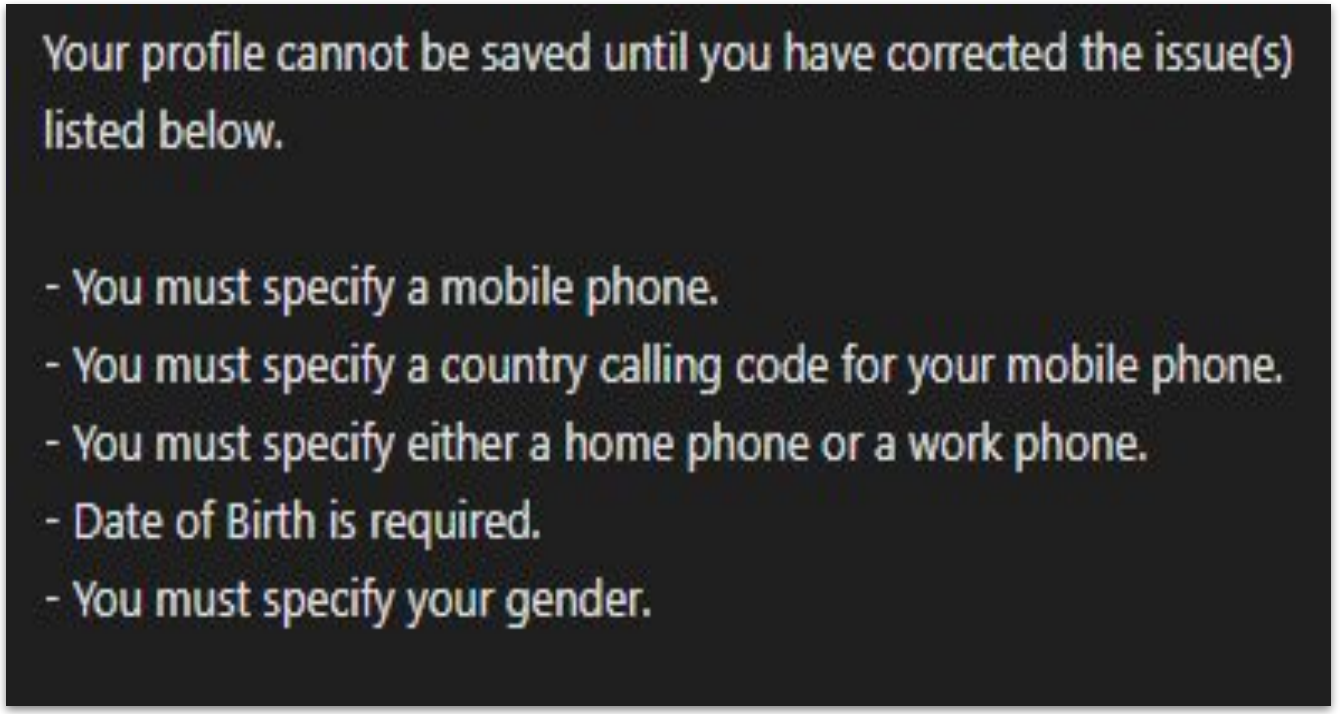


Profile Options:
Your Name and Airport Security

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

Profile Options

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



Profile Options:
Why should I verify my email address?

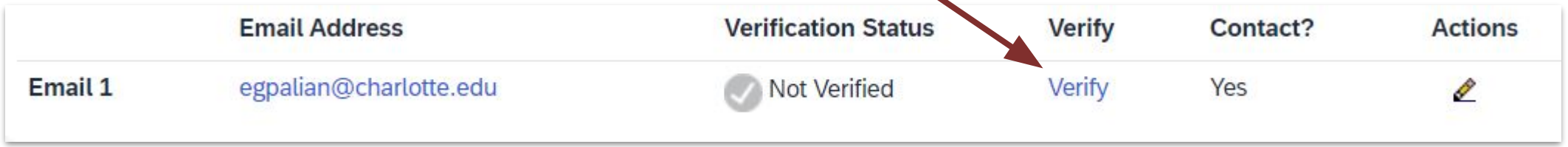
This verification step is required so that receipts can be emailed to Concur at receipts@concur.com and uploaded into your Available Receipts list.

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

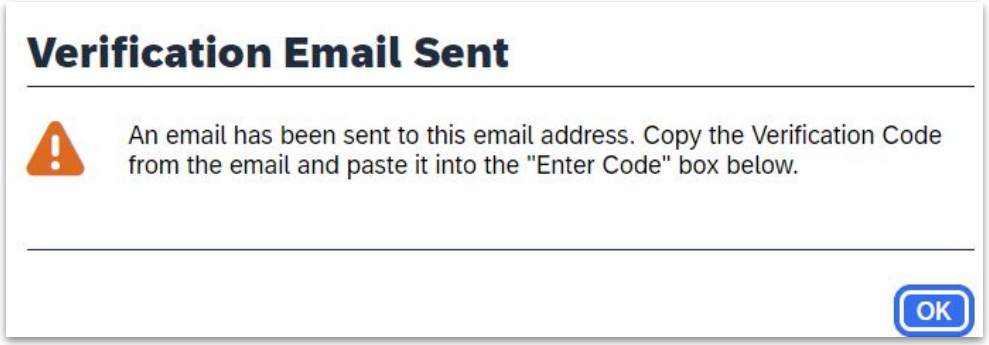
Other personal email addresses can be added and verified.

Profile Options:
Verify Your Email Address

Select Verify



	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	egpalian@charlotte.edu	Not Verified	Verify	Yes	



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	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

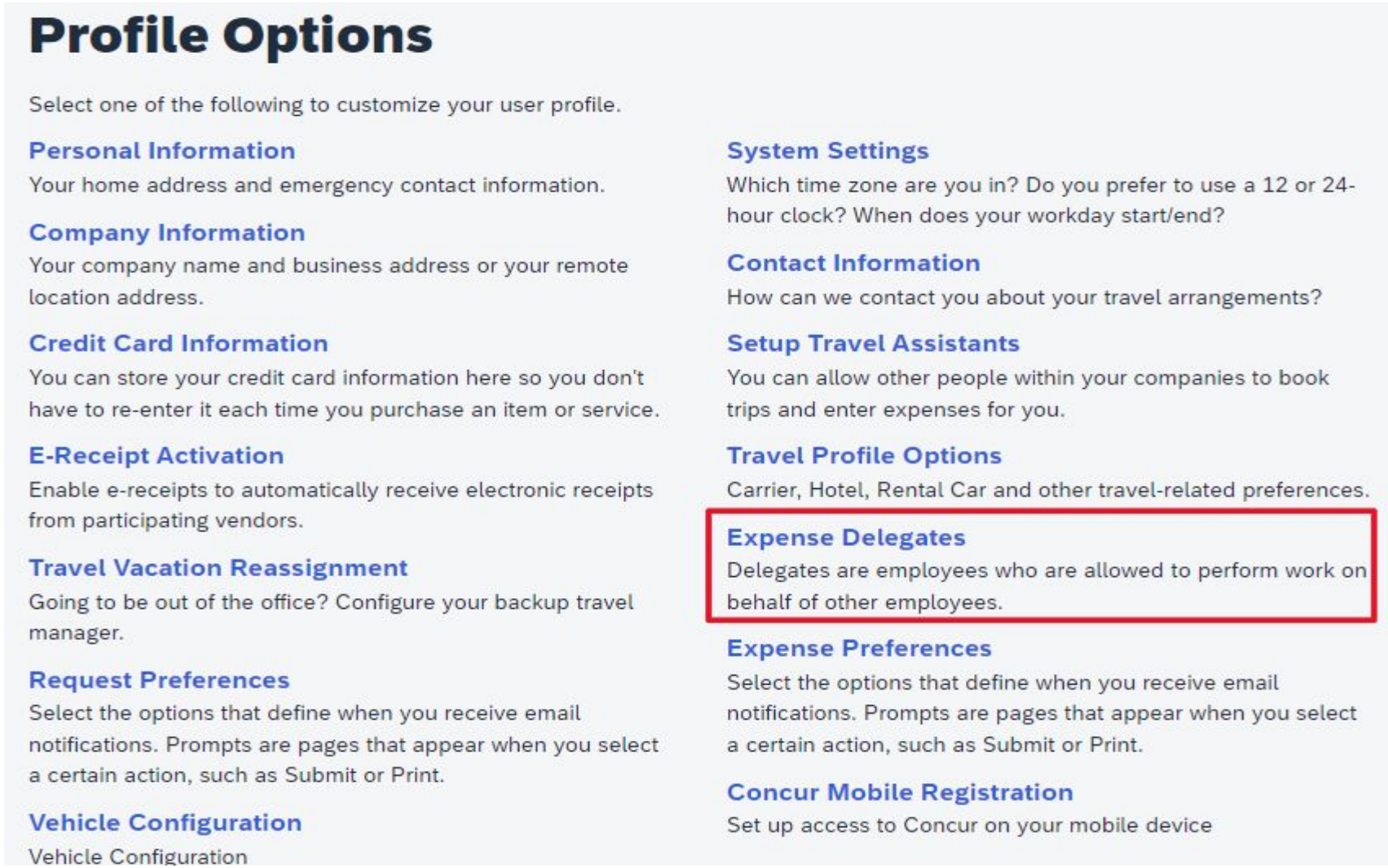
OK

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

Setting up your Delegates

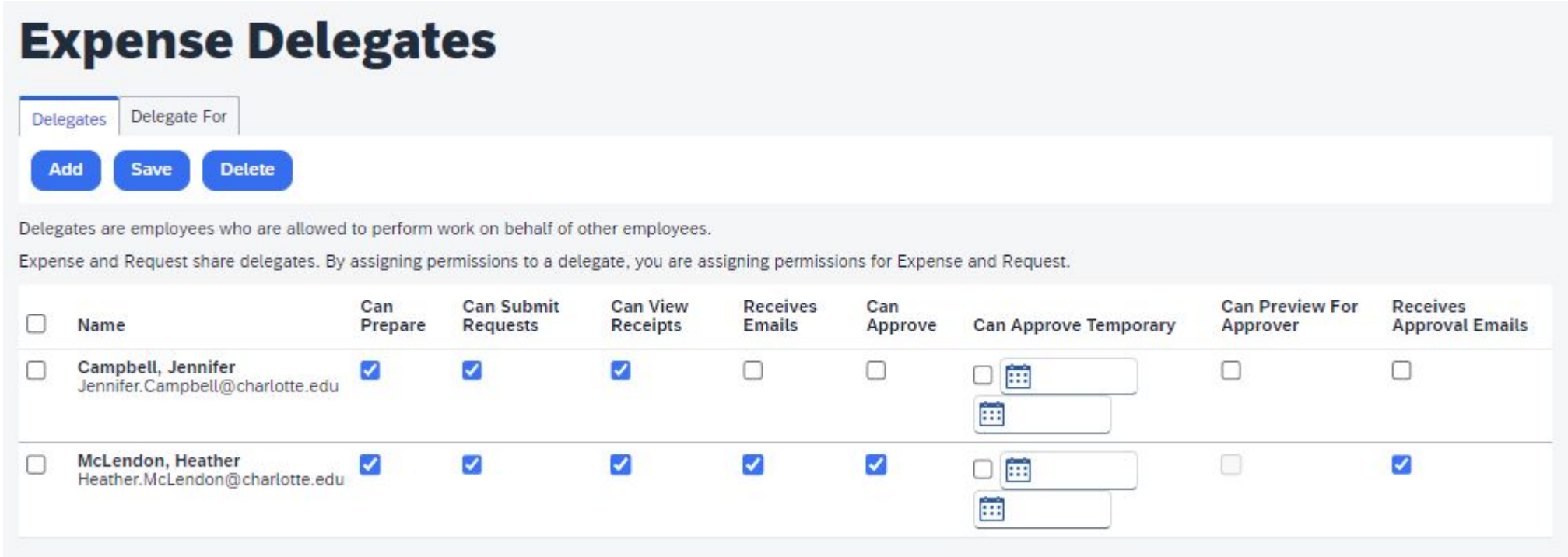
- A delegate in Concur is a user who is granted permission to act on behalf of another user to perform tasks.
- Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request tasks.
- There is no limit to the number of delegates that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

Add Delegates: Select Tasks



Add Delegates: Select Tasks

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



What Concur Delegates *can* do

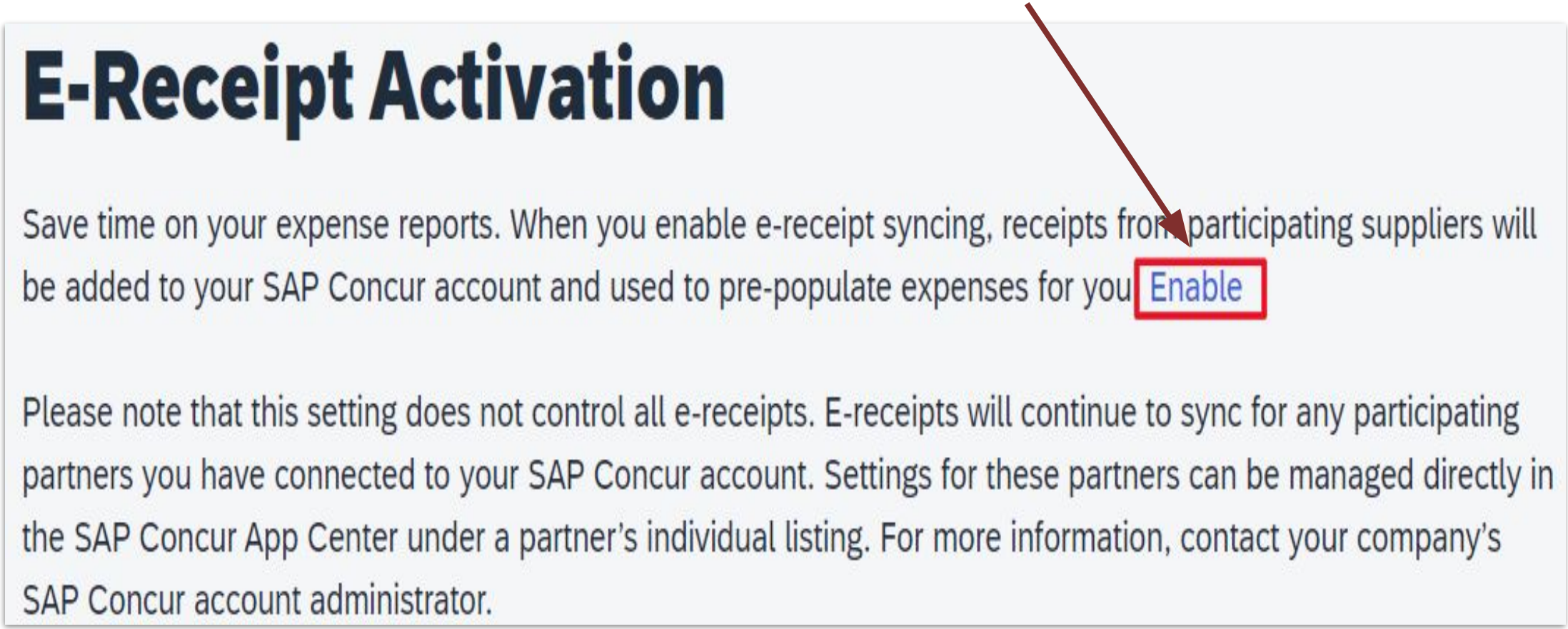
When assigning a delegate in the system, the user determines the tasks a delegate can perform on their behalf. The following tasks can be assigned to a delegate:

- 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

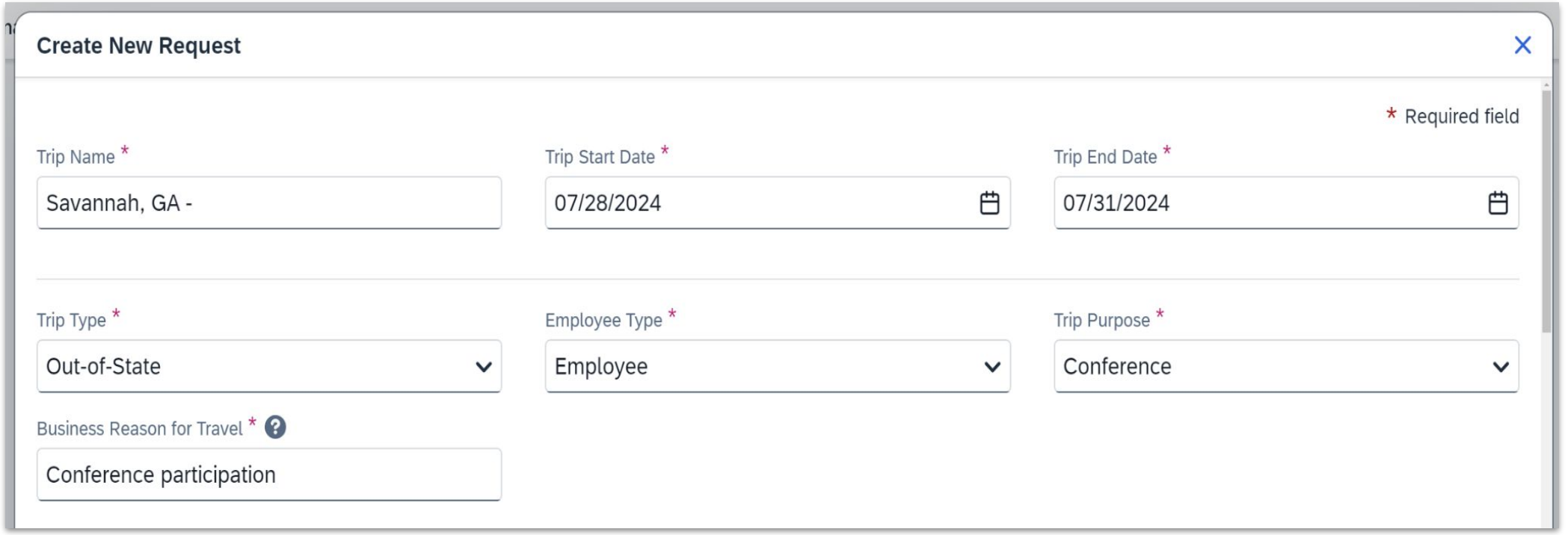
- Add Delegates
- Complete email verification, it requires receipt of and action from the email that is generated
- Submit an Expense Report, they can **Send for Review** to the user who will need to Submit

E-Receipt Activation



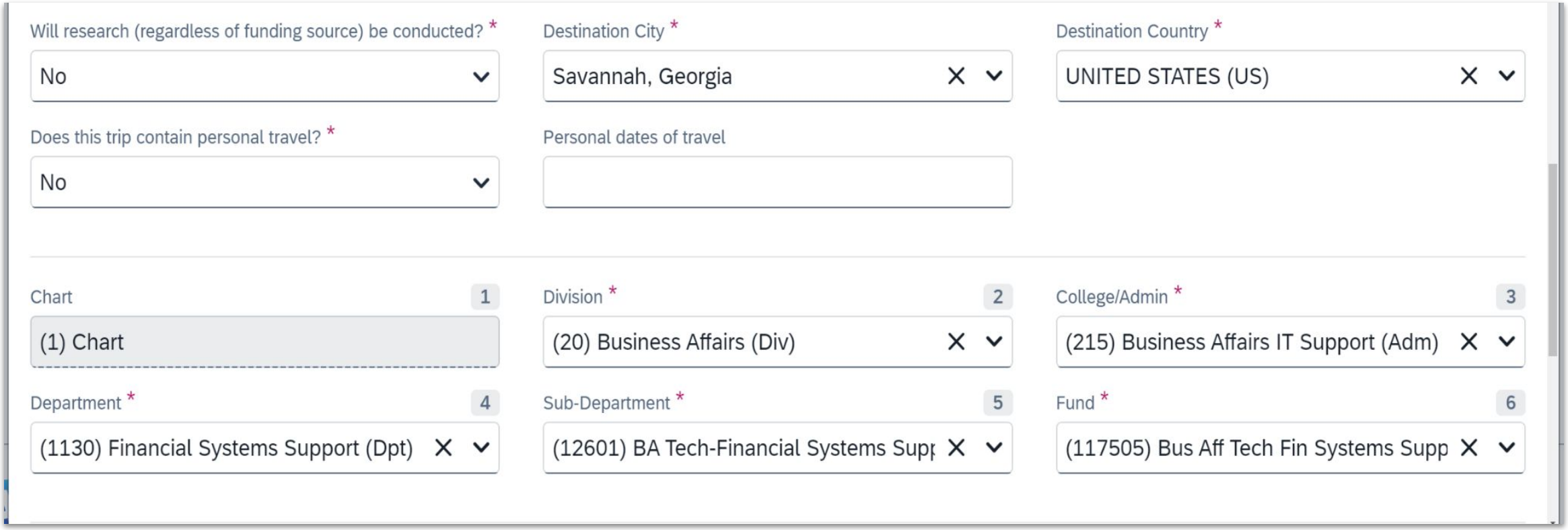
Travel Request Process

Complete the fields



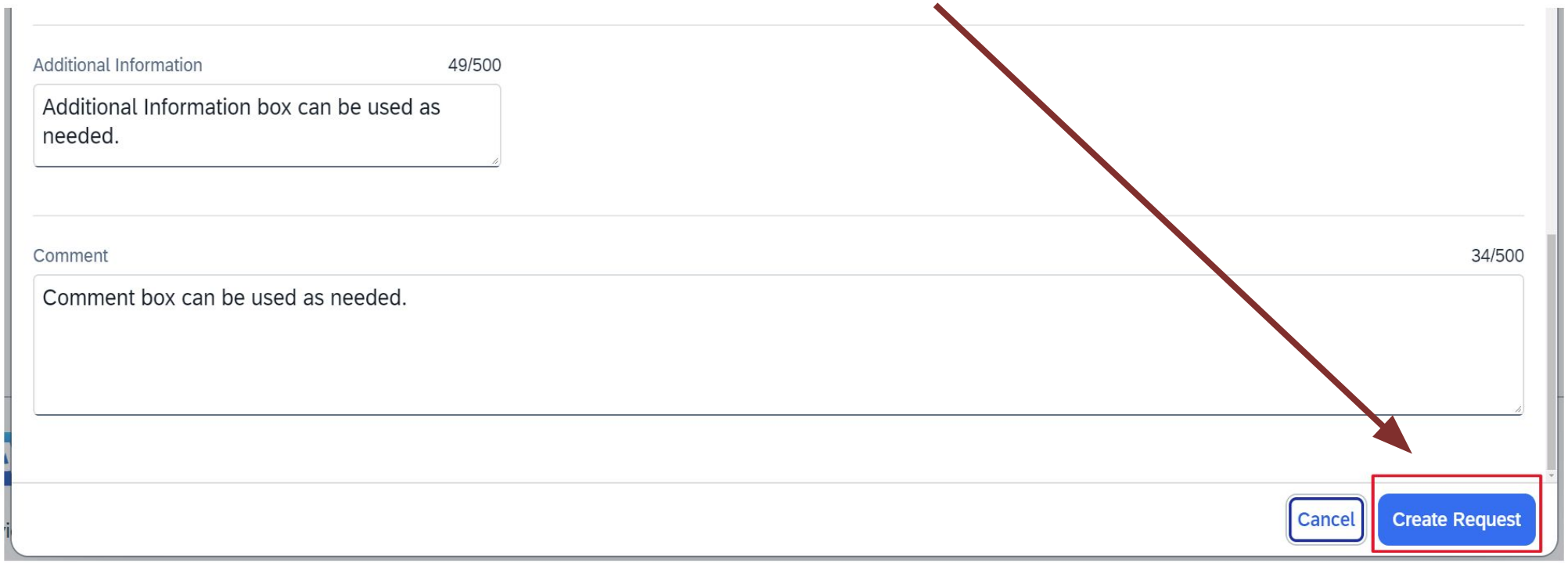
Travel Request Process

***Complete the fields**



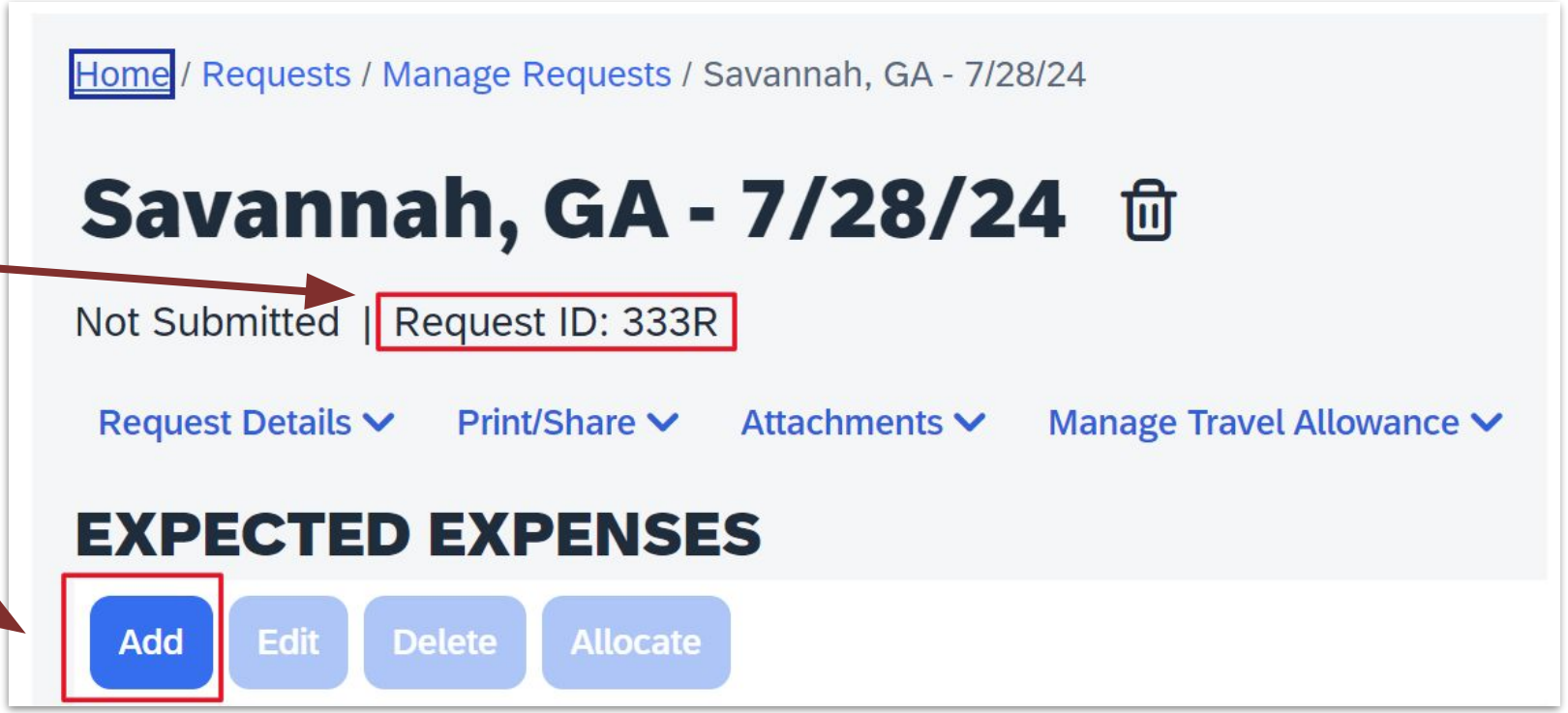
Travel Request Process

Select Create Request



Travel Request Process

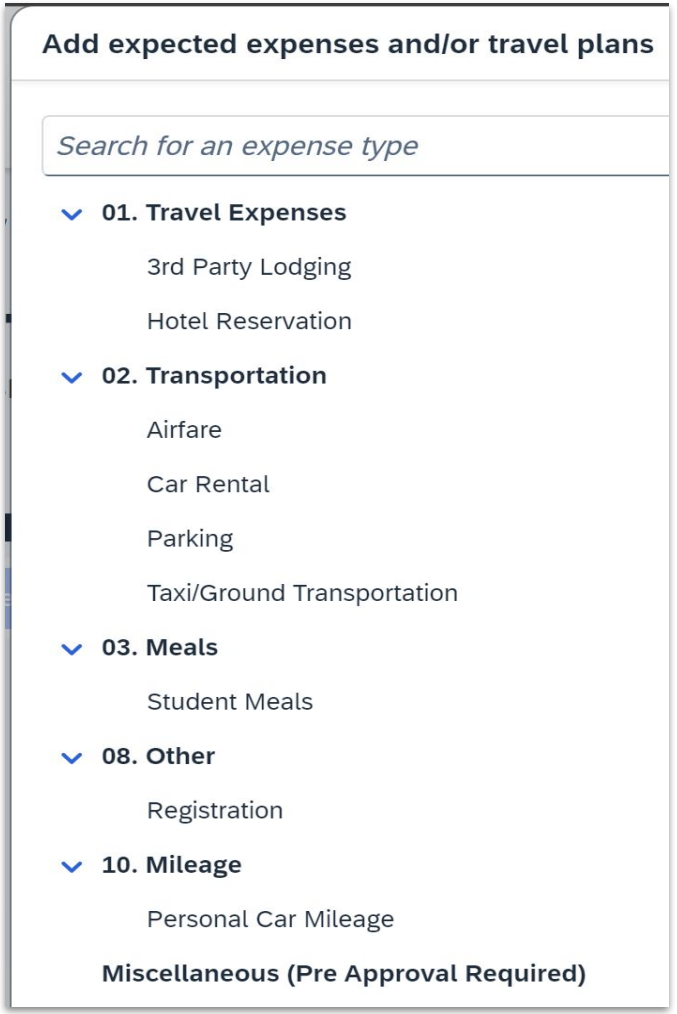
- Notice the Request ID
- Select Add (Expected) Expenses



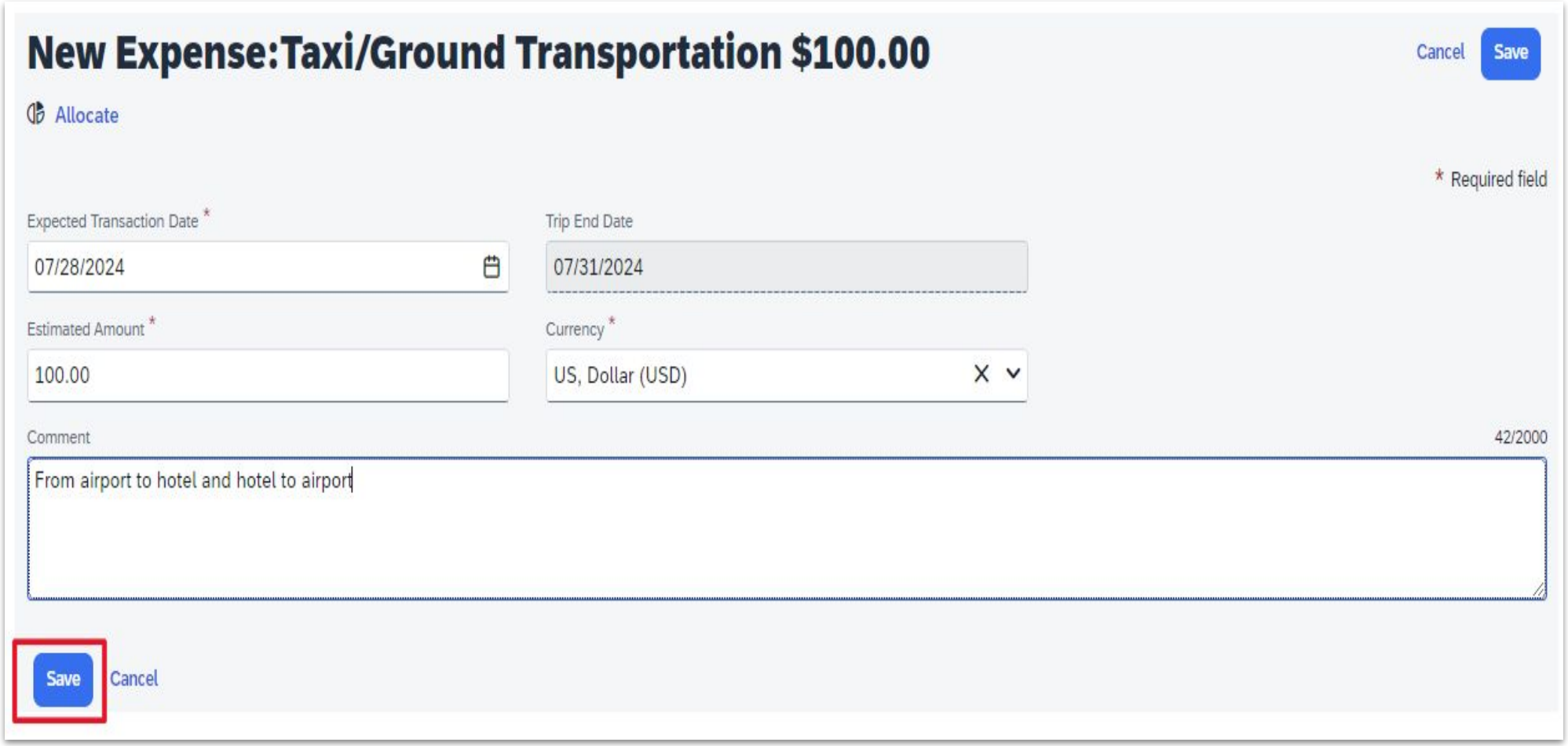
Travel Request Process

Expense Types

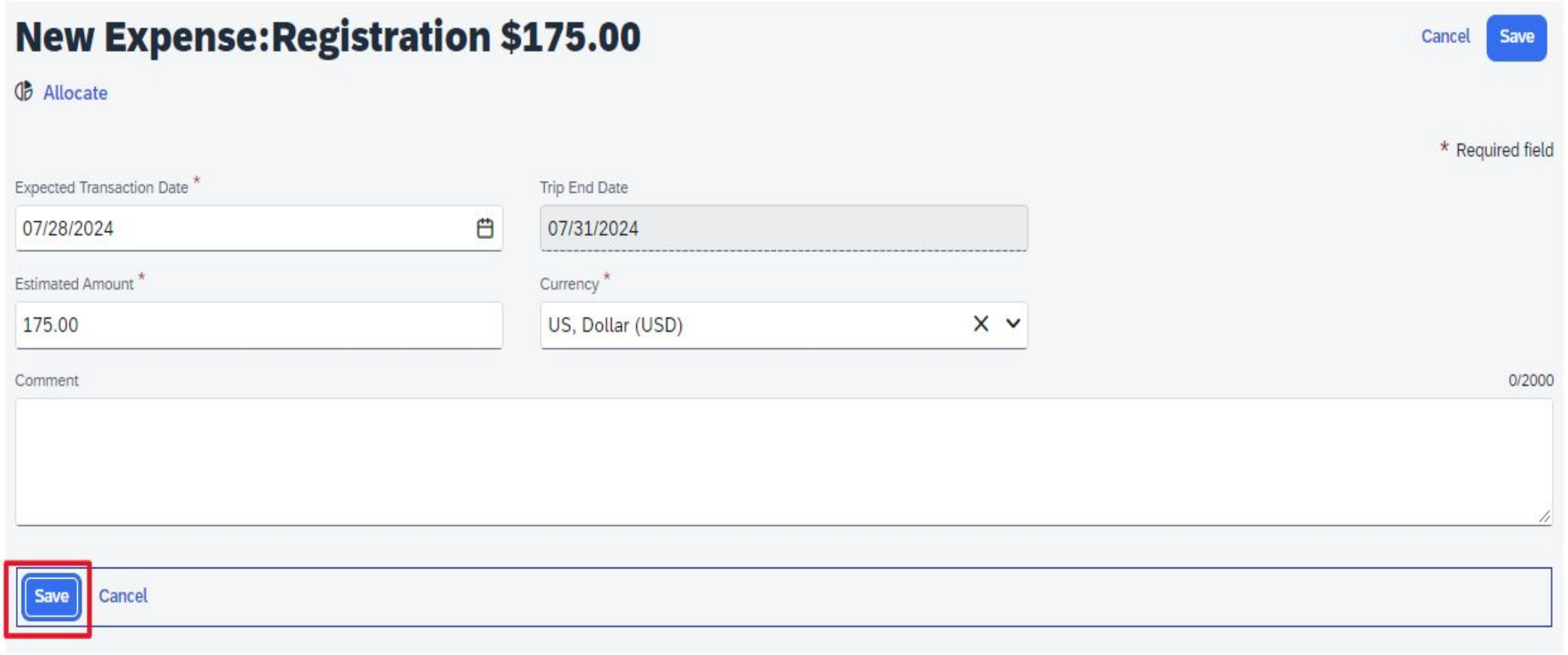
Expense Types are configured with our account codes and based on the Trip Type selected in the Header, they will post as: in state; out of state; or international.



Travel Request Process



Travel Request Process



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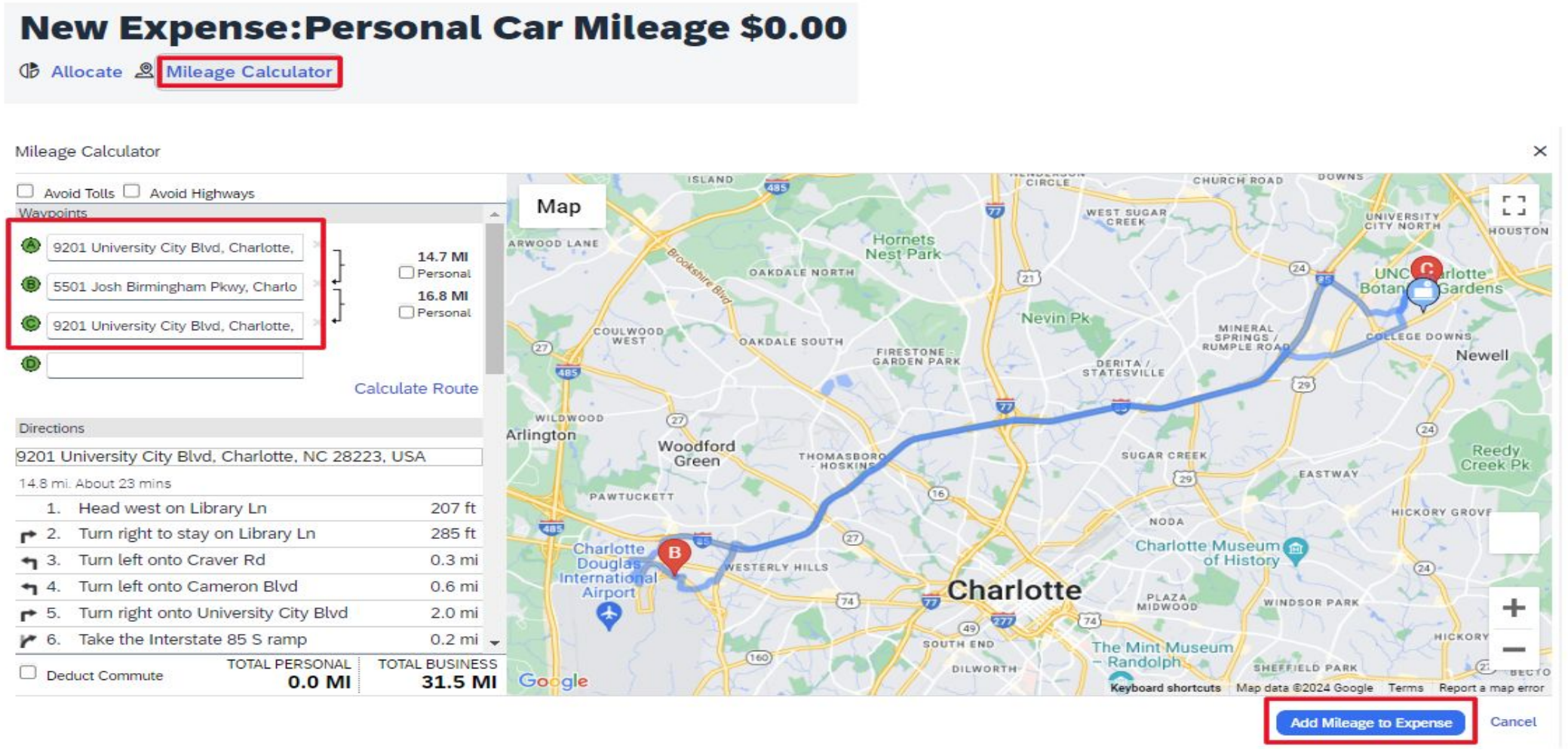
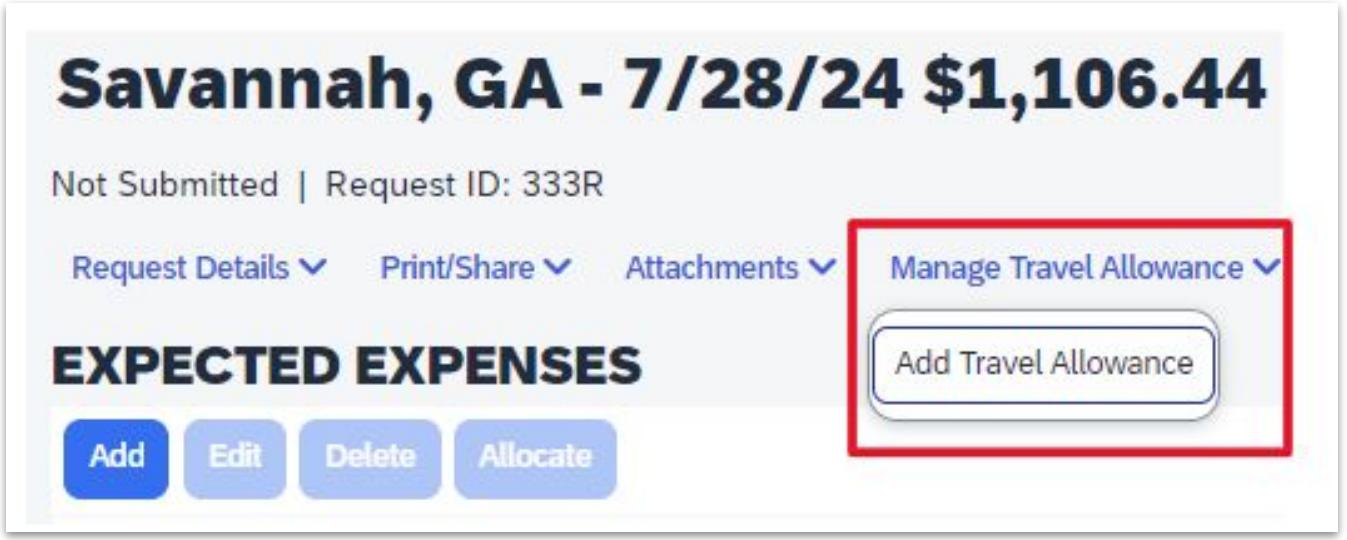
Travel Request Process



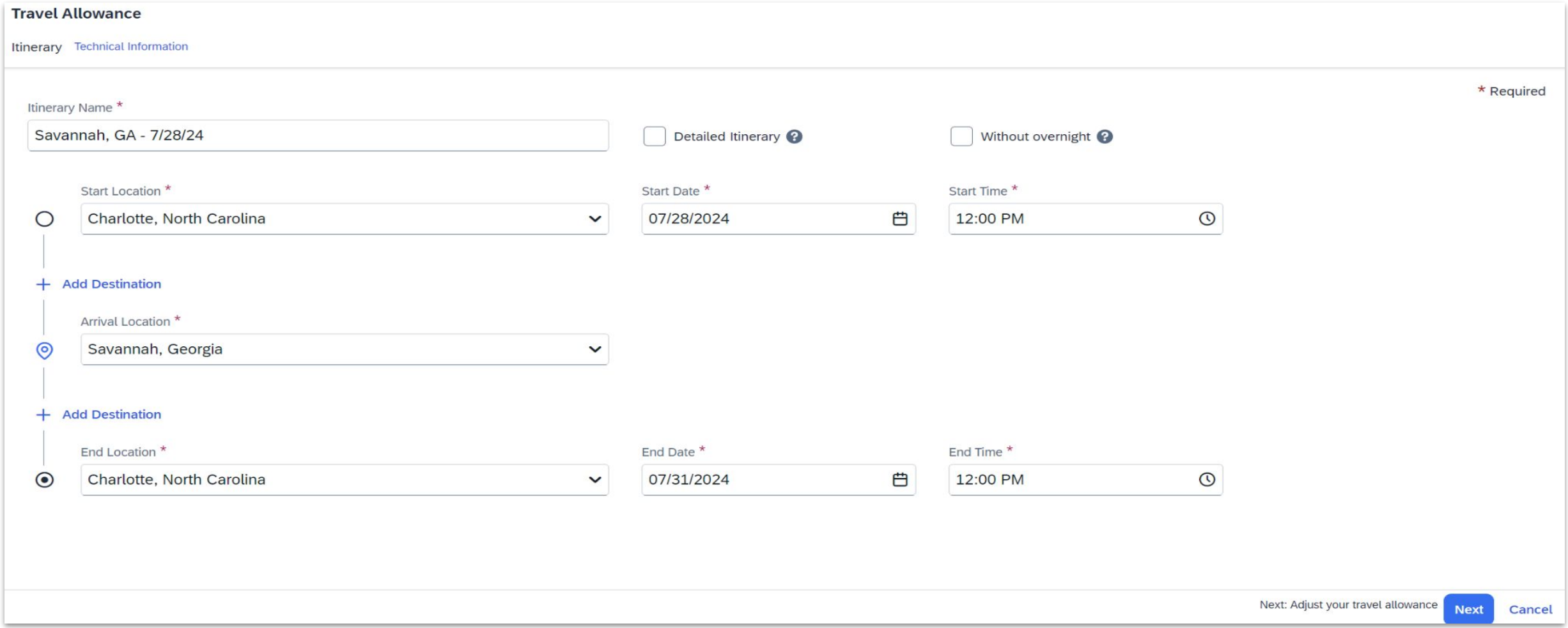
Travel Request Process

Travel Request Process

Manage Travel Allowance (previously known as per diem)



Travel Request Process



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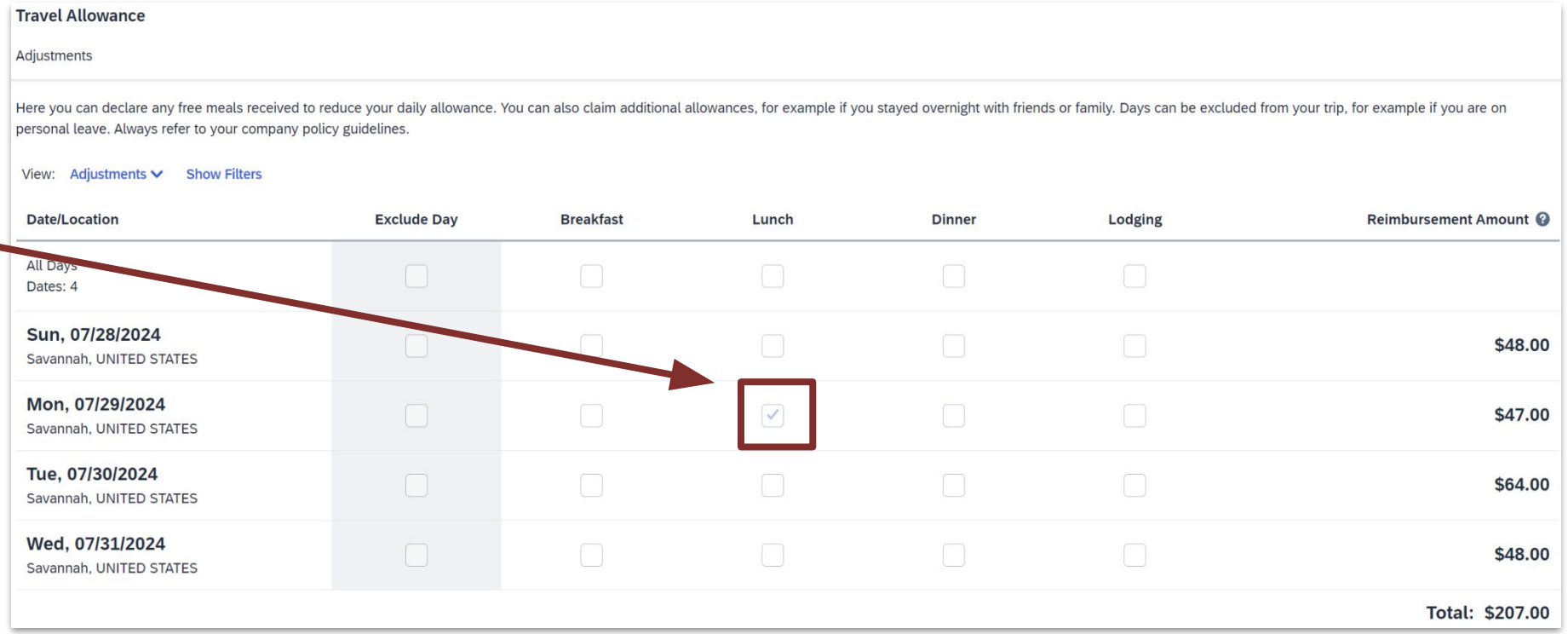
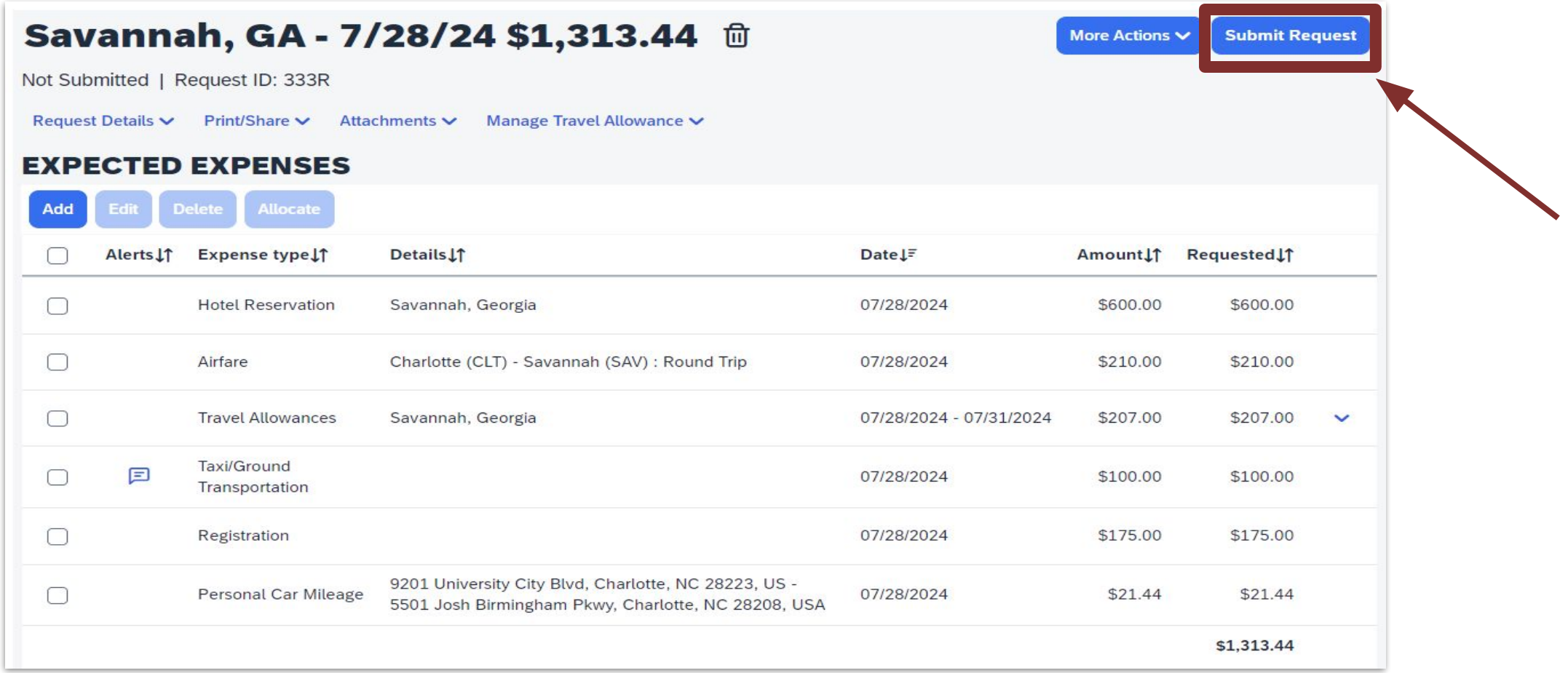
Travel Request Process

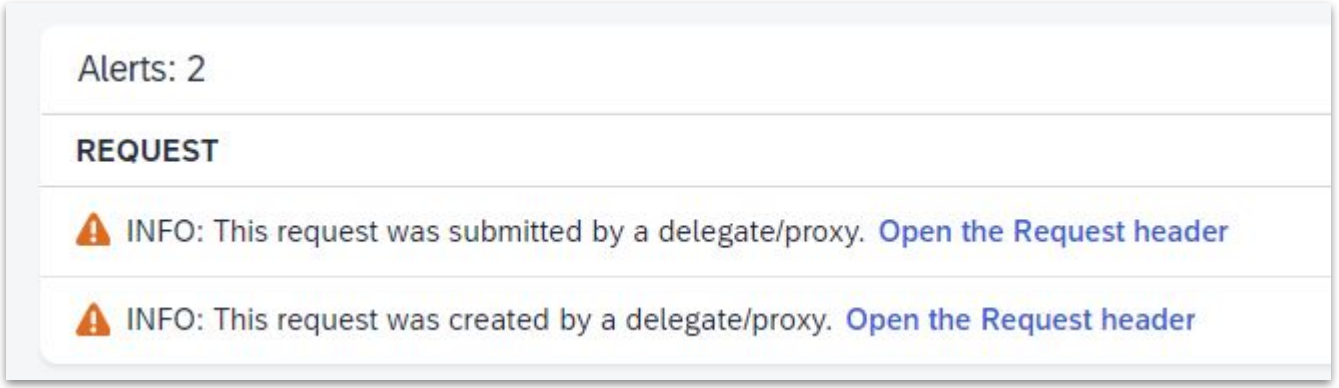
- Check any meals that will be provided
- Select Finish



Travel Request Process

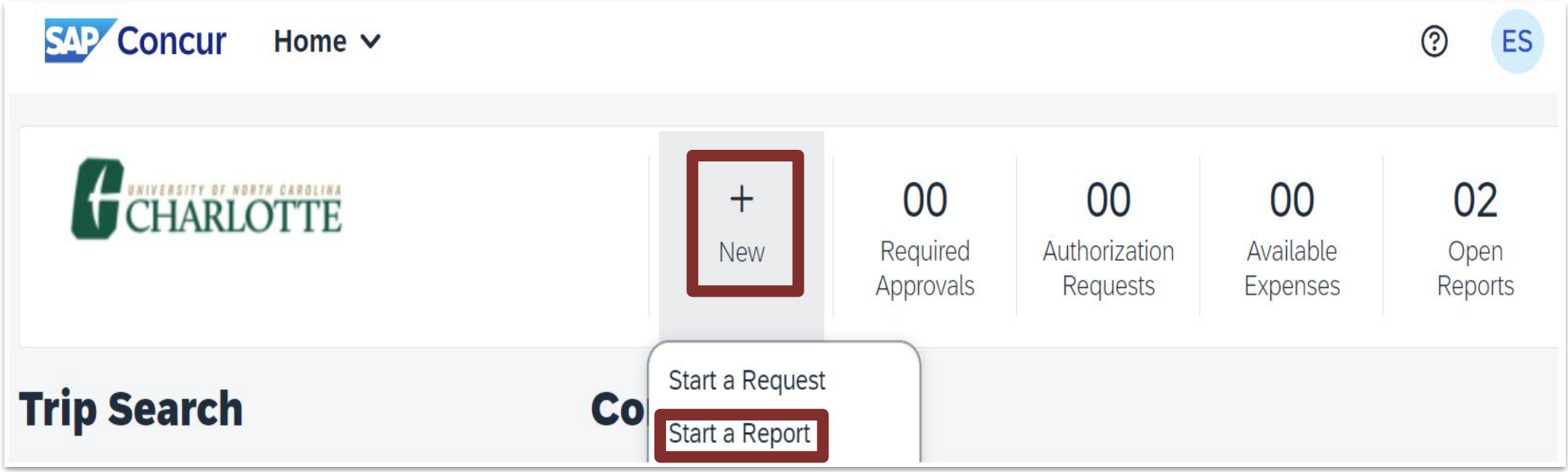


Travel Request Process

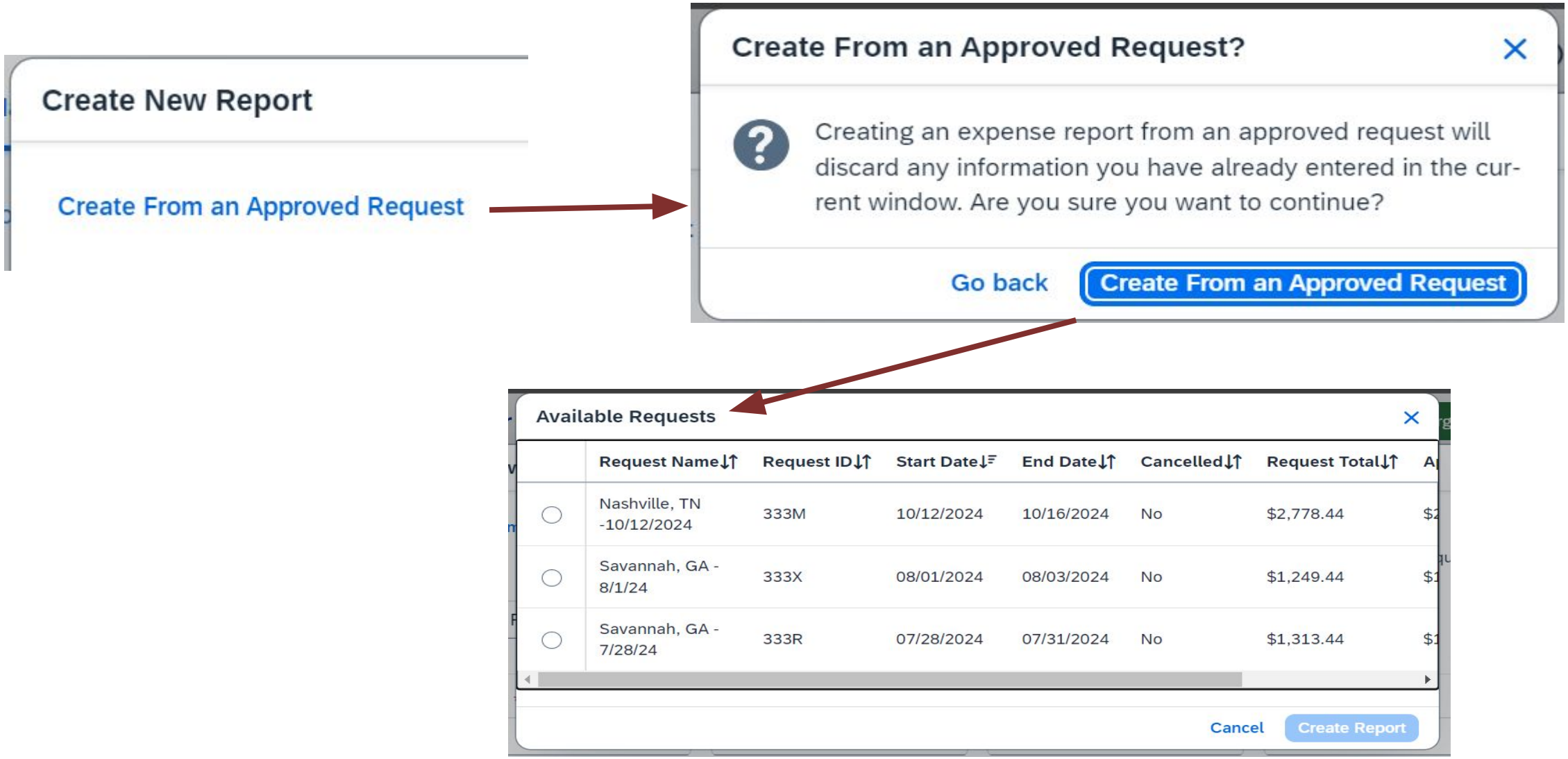


Expense Report Process

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



Expense Report Process



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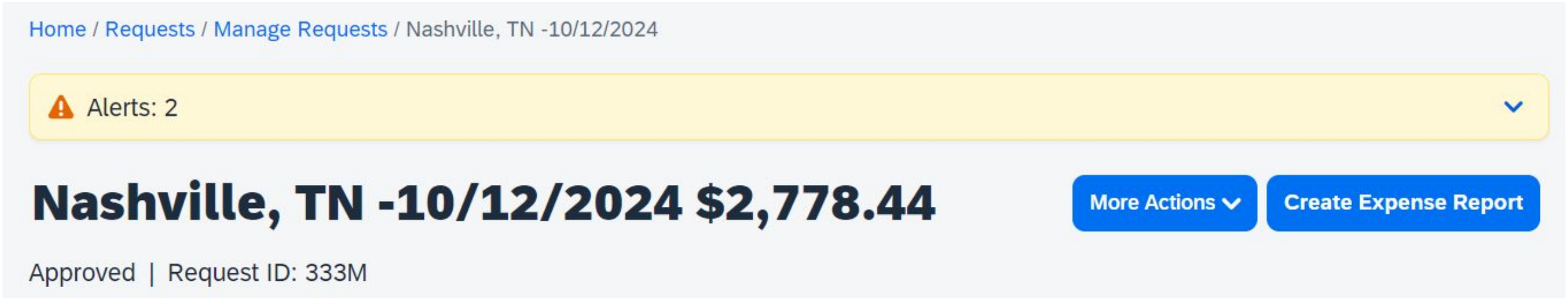
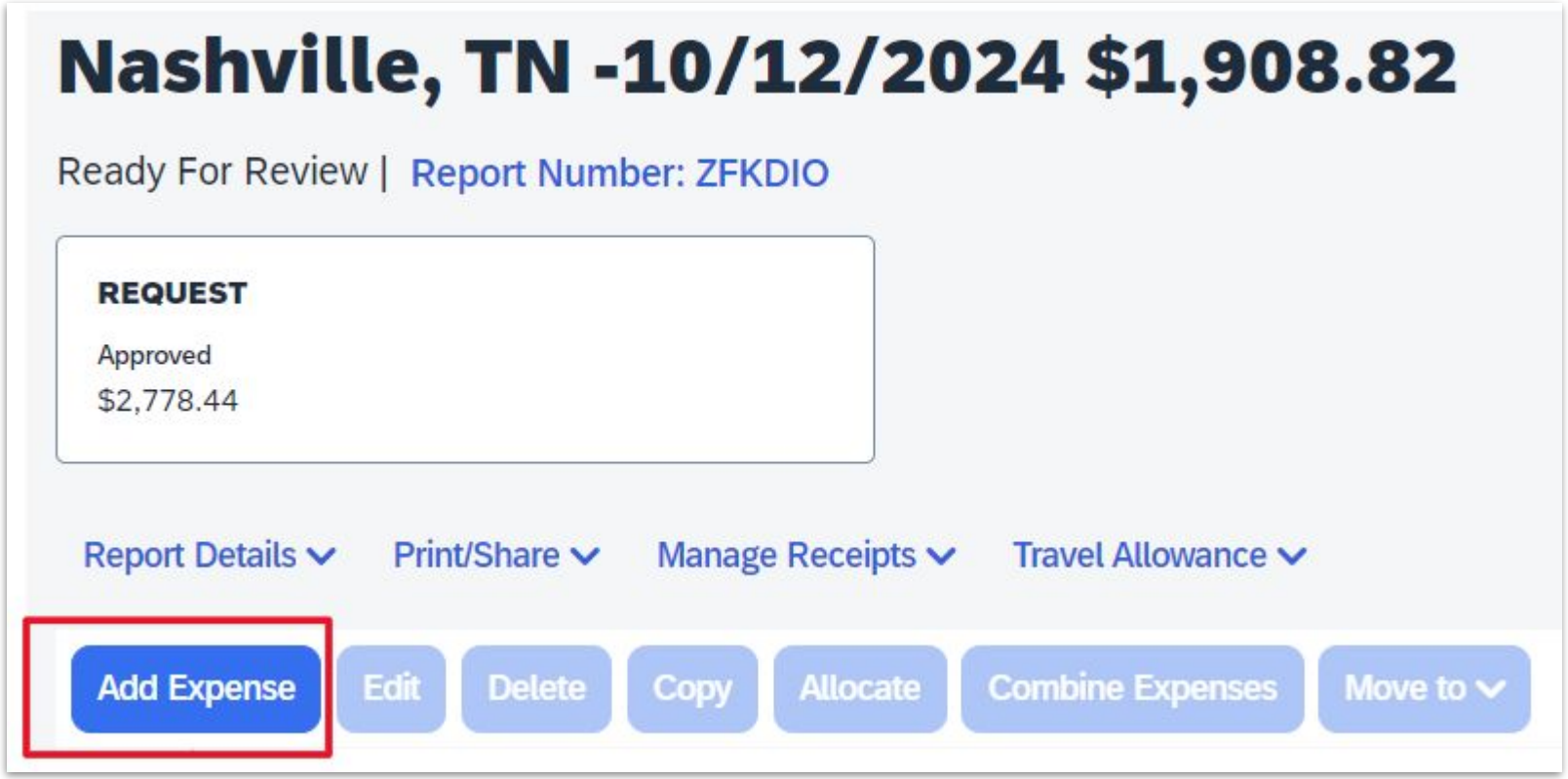
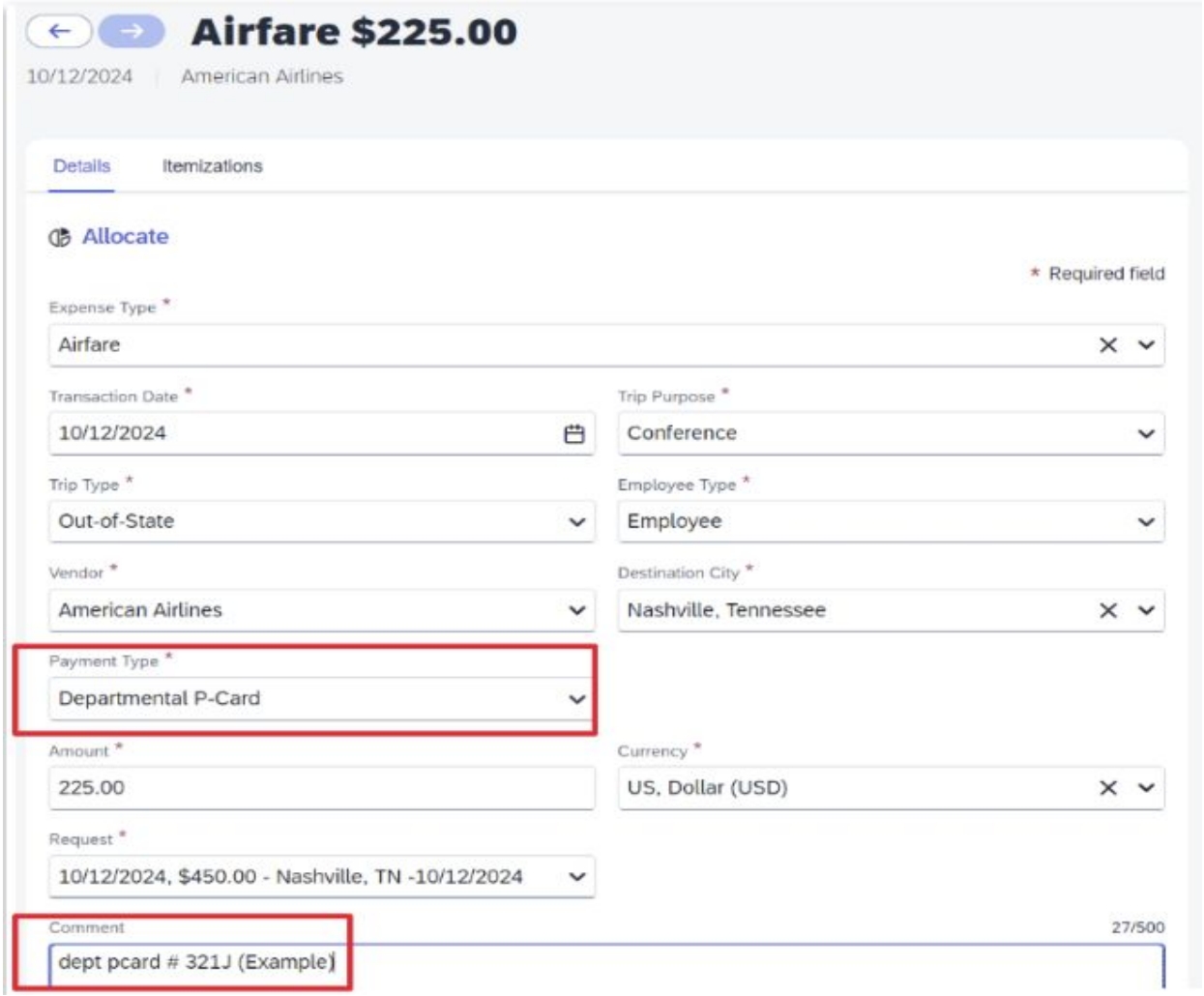


Expense Report Process



Expense Report Process

Expense Report Process



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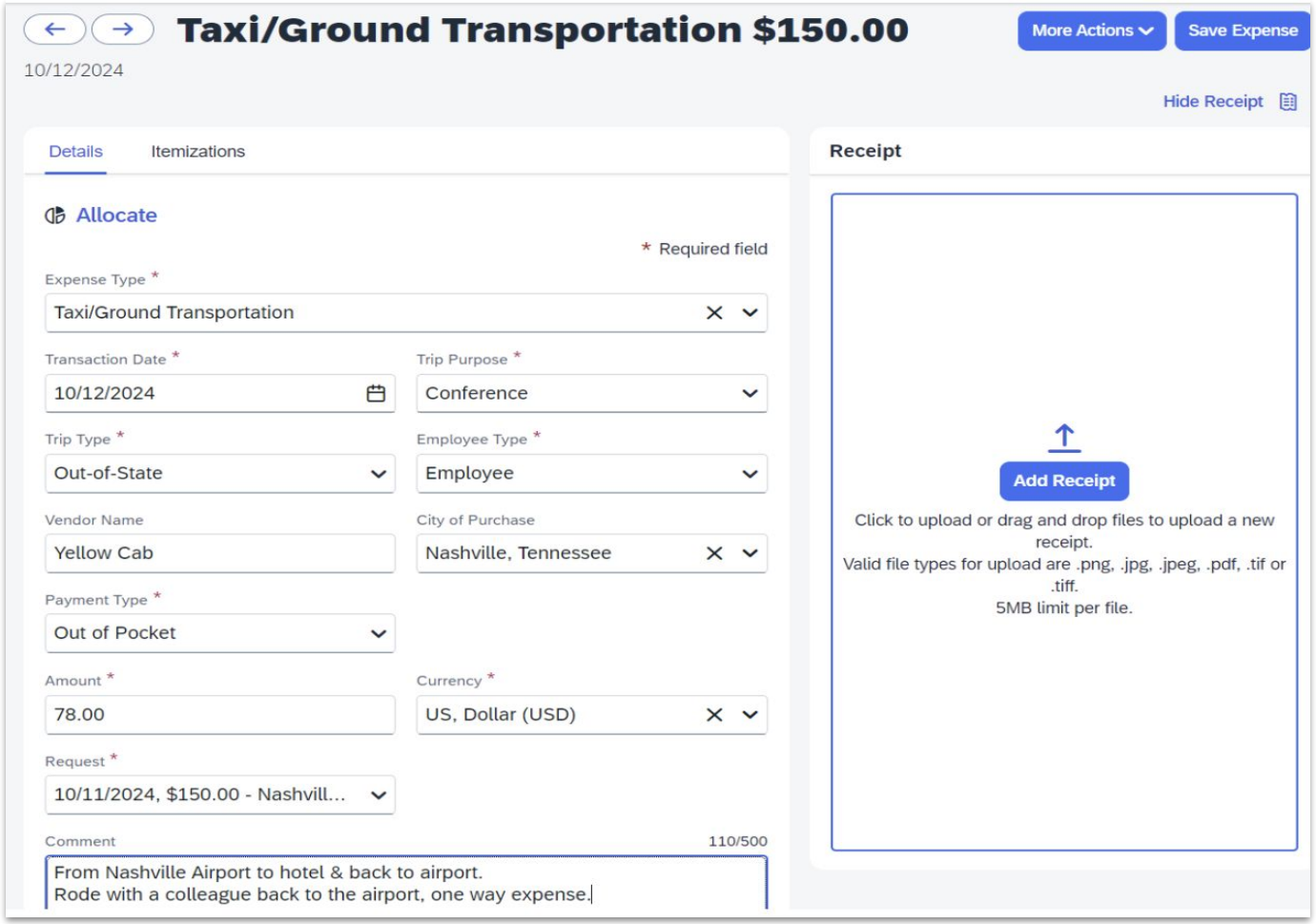
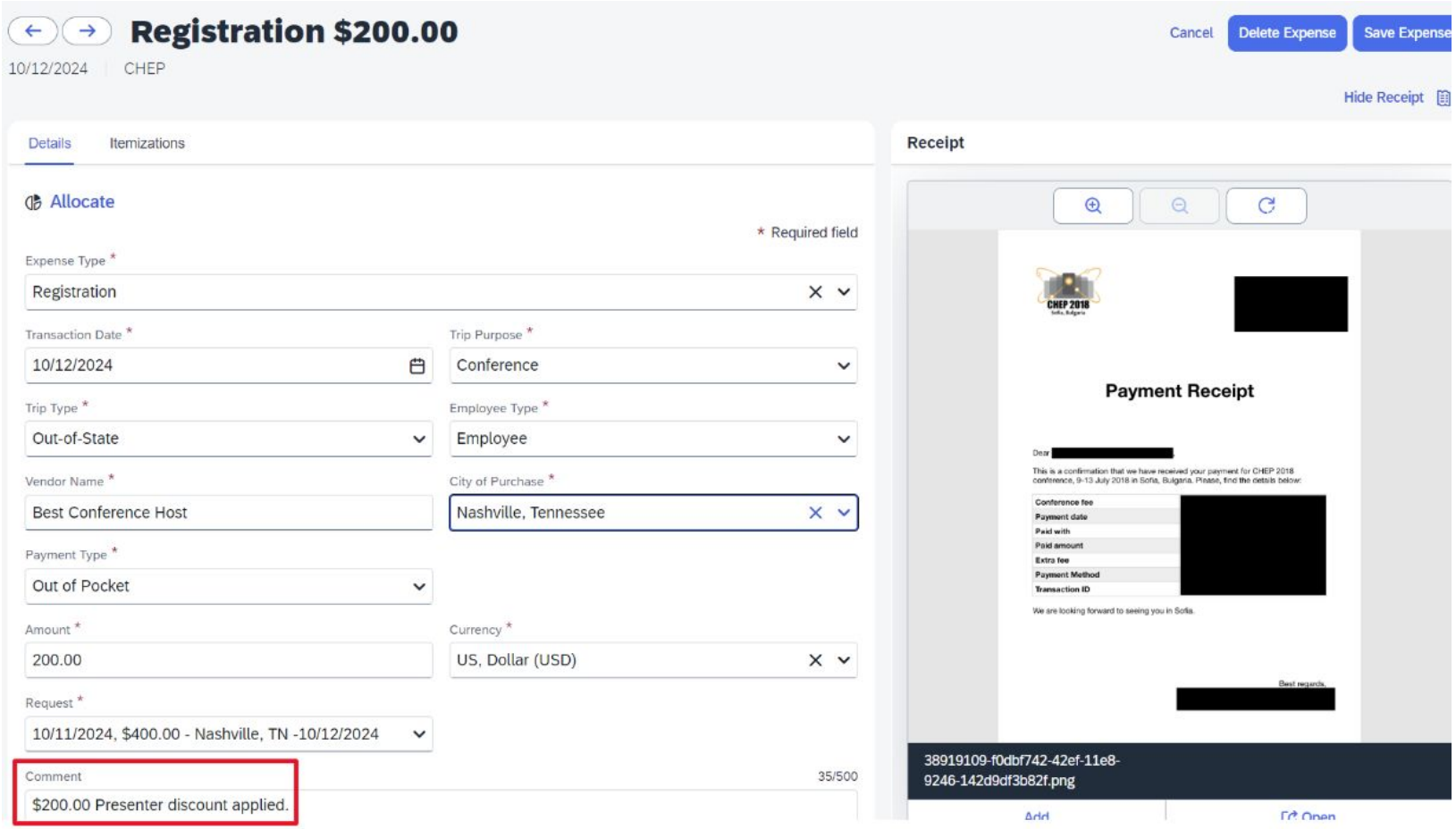


Expense Report Process



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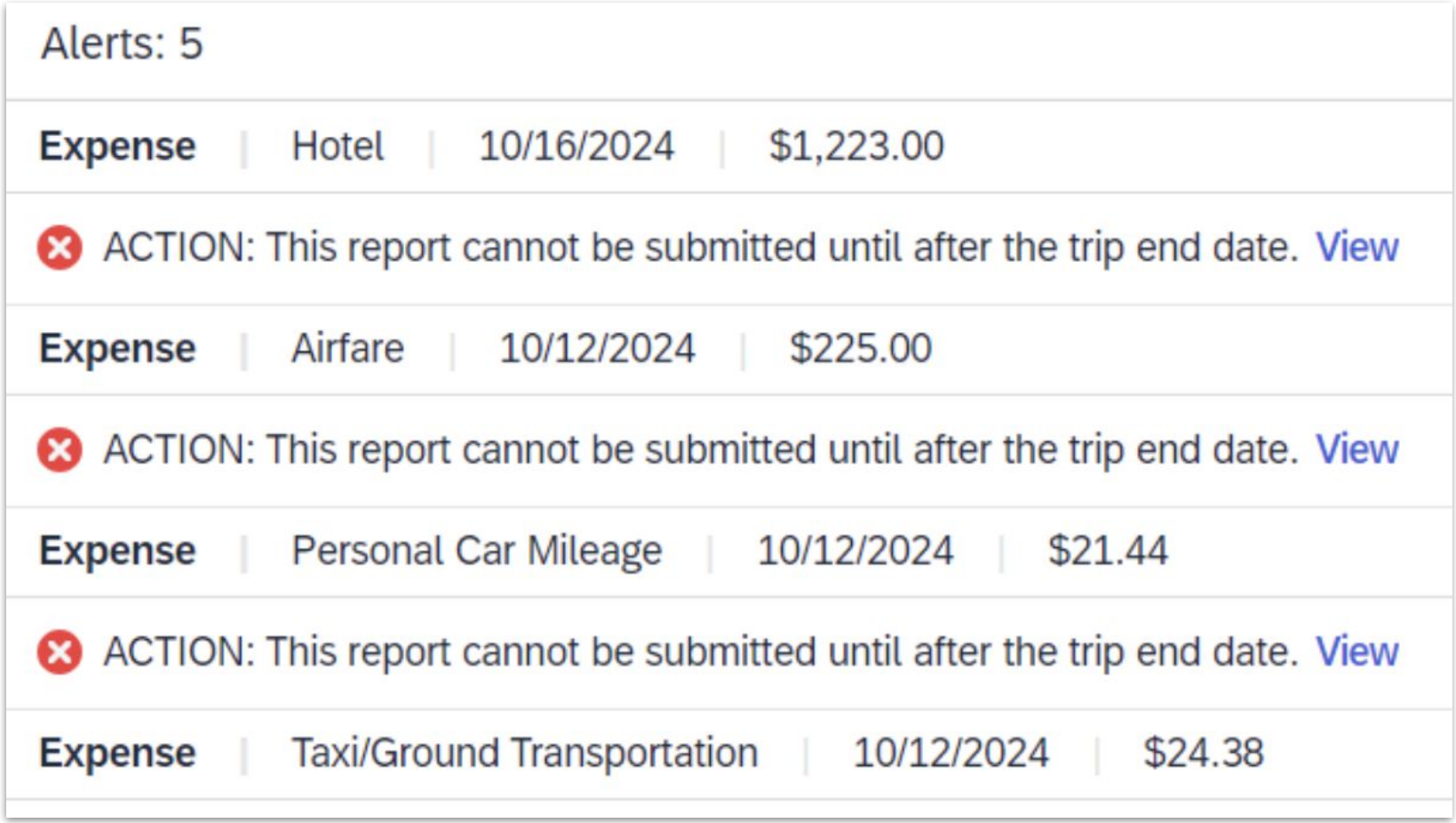
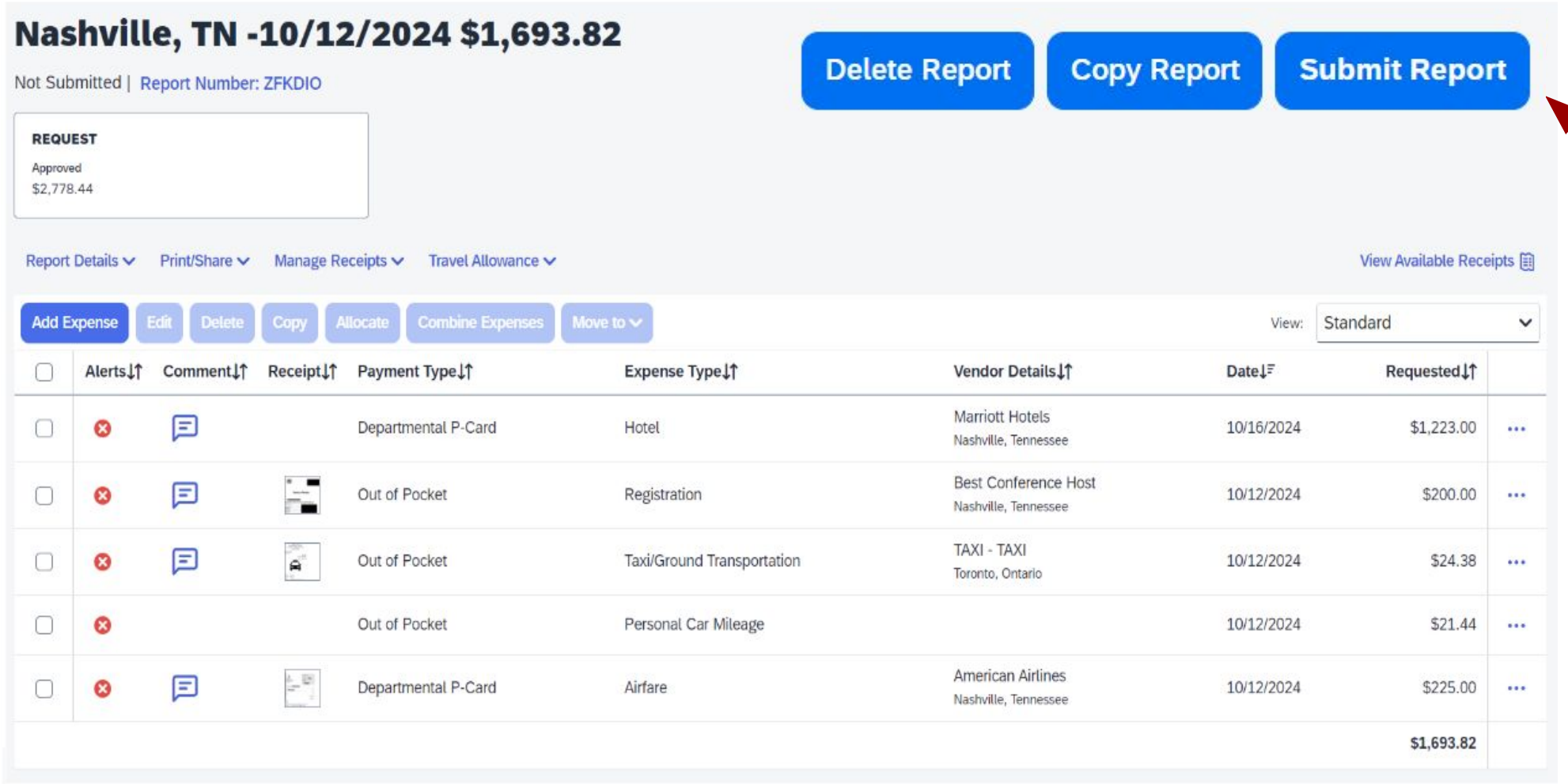
Expense Report Process



Expense Report Process



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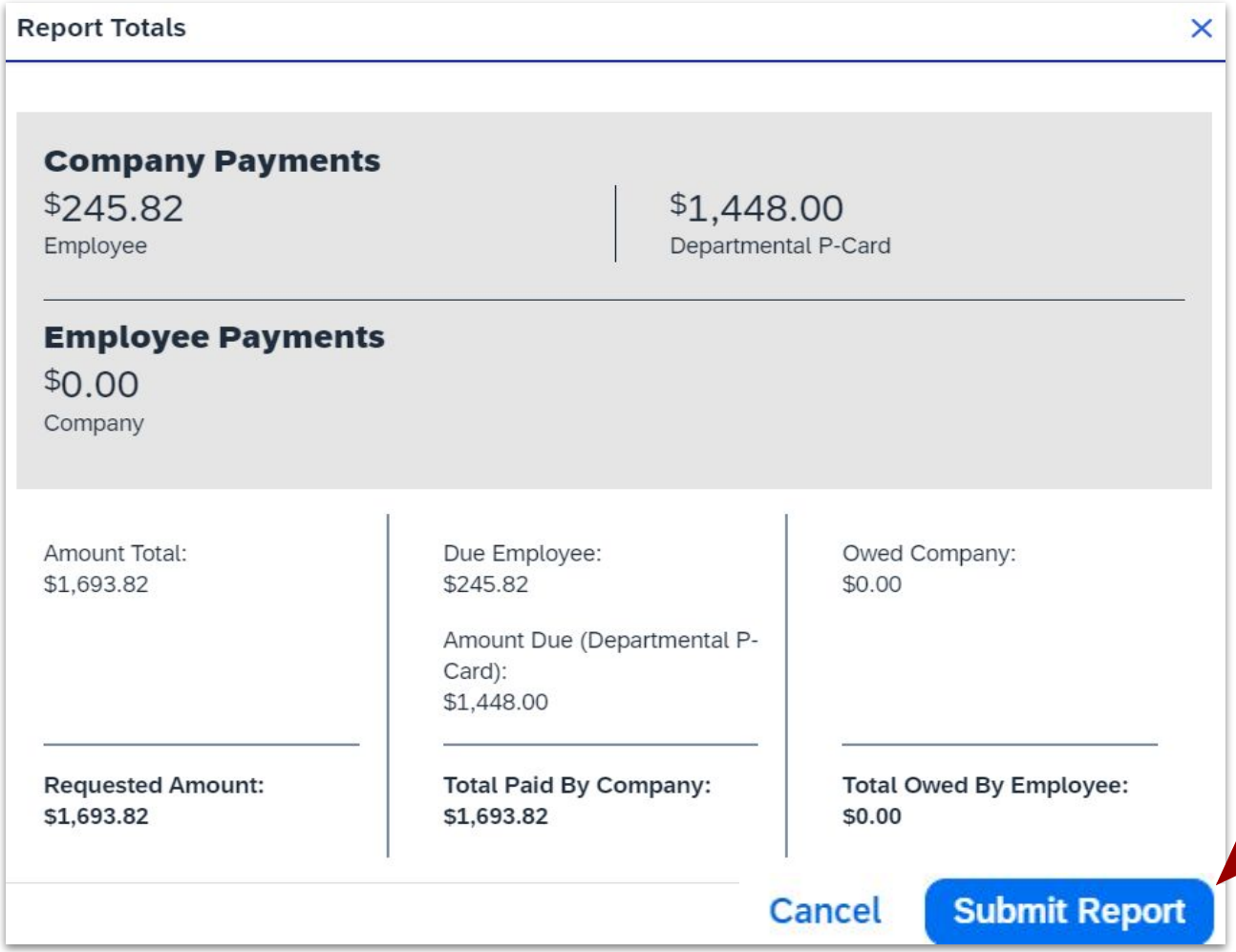
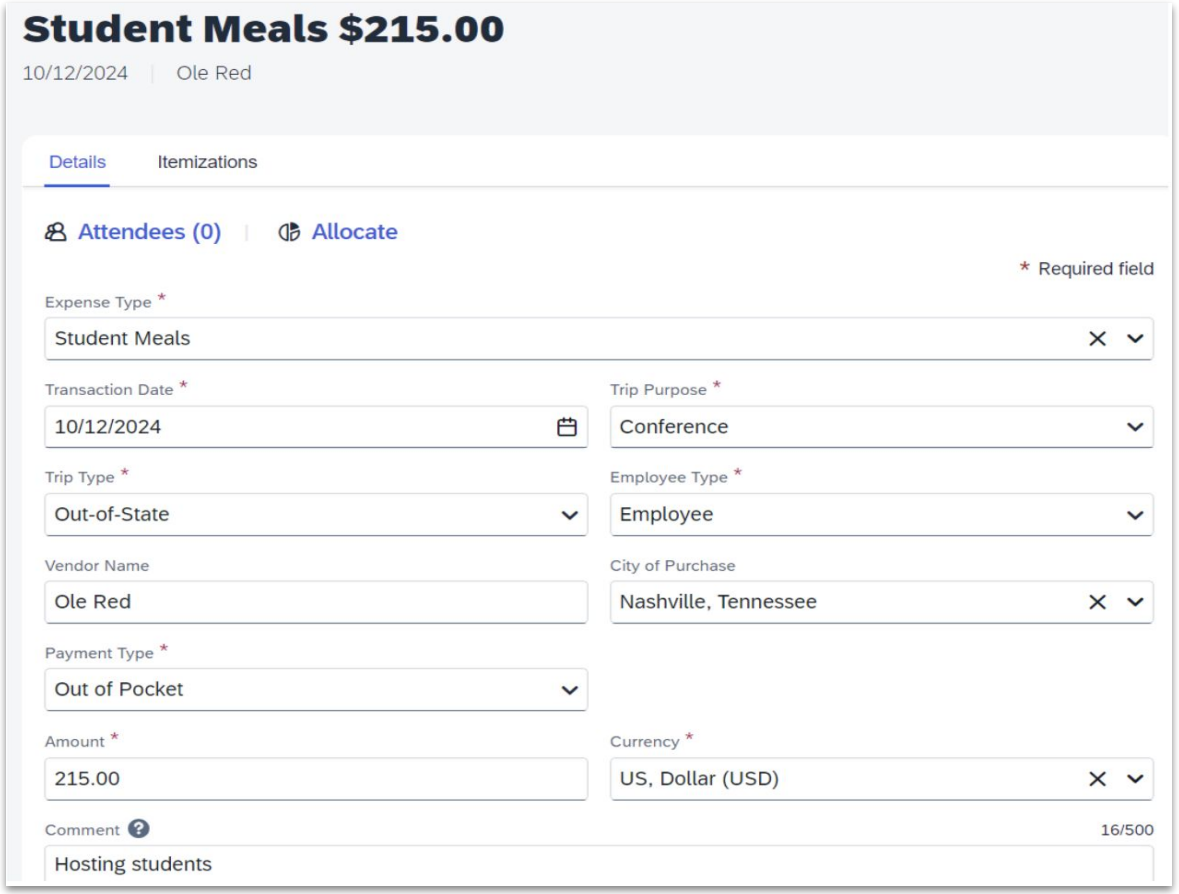


Expense Report Process

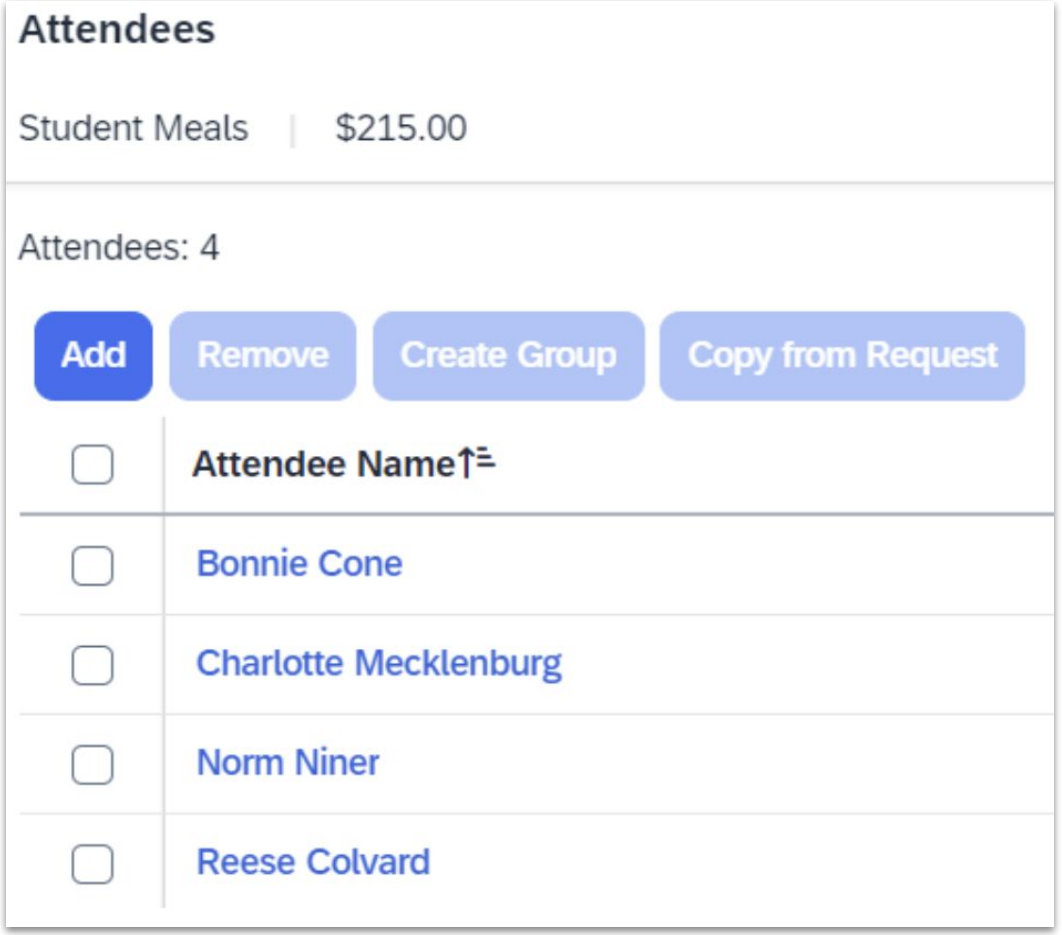
Expense Report Process

Adding Attendees

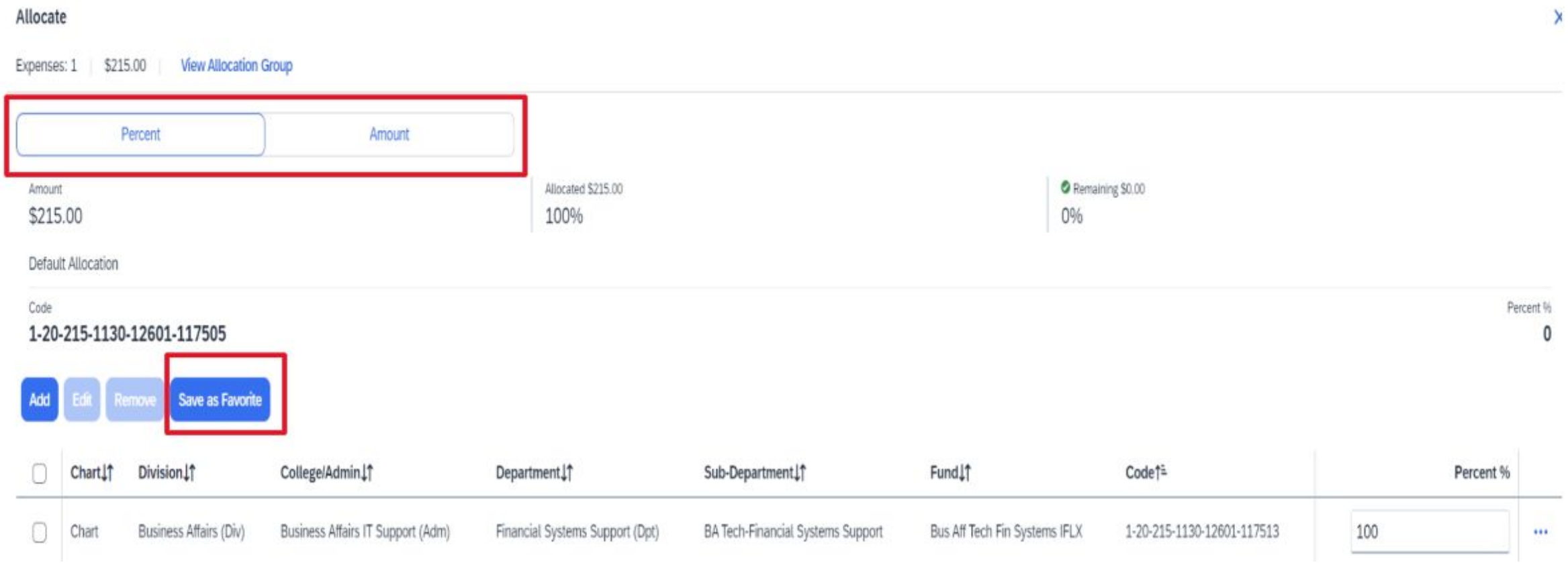


Expense Report Process

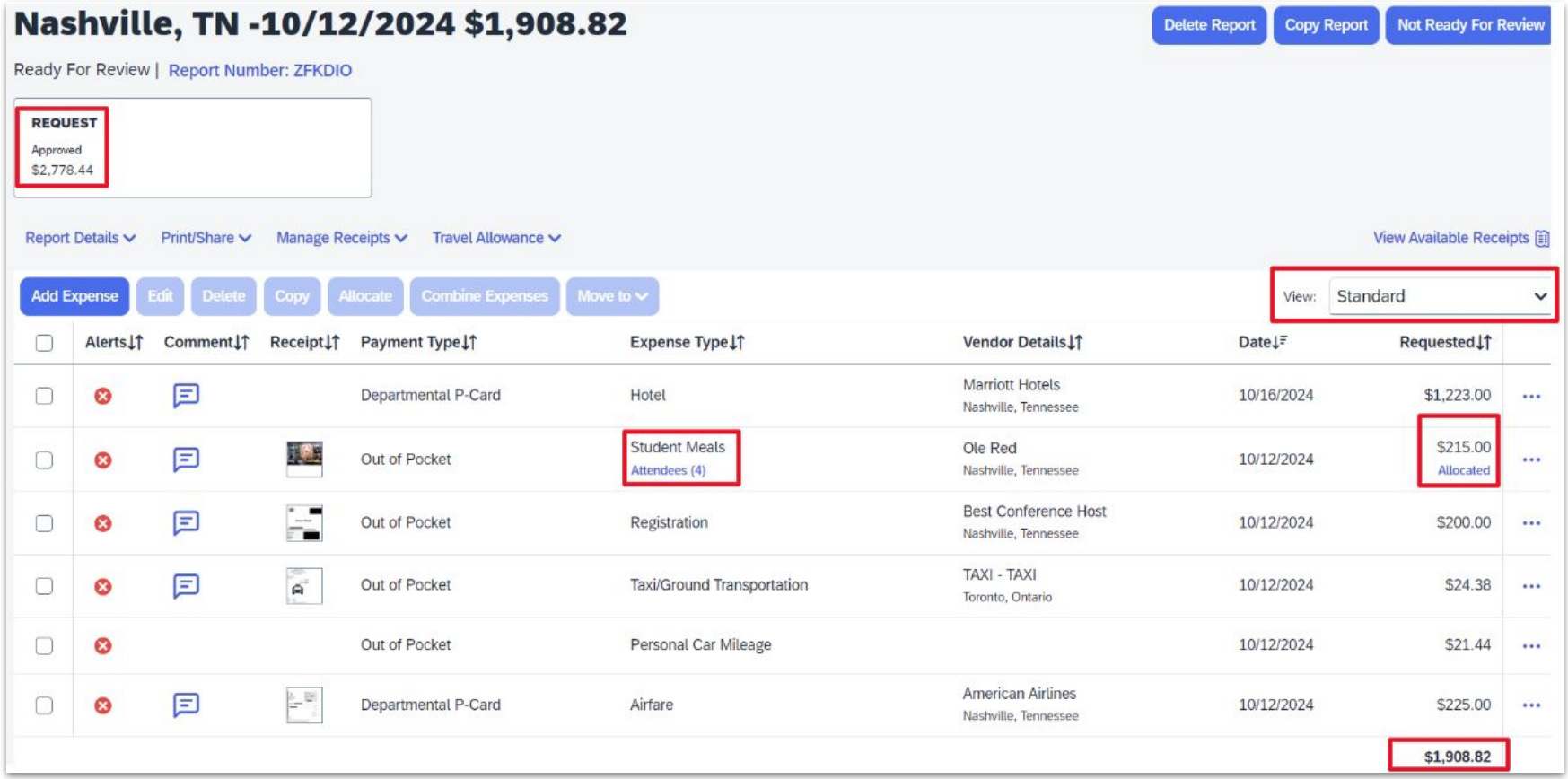
- Select **Employees**, or **add non-employees**
  - Added attendees will only be added to this User's profile, not to the system for future use



Expense Report Process
Allocate

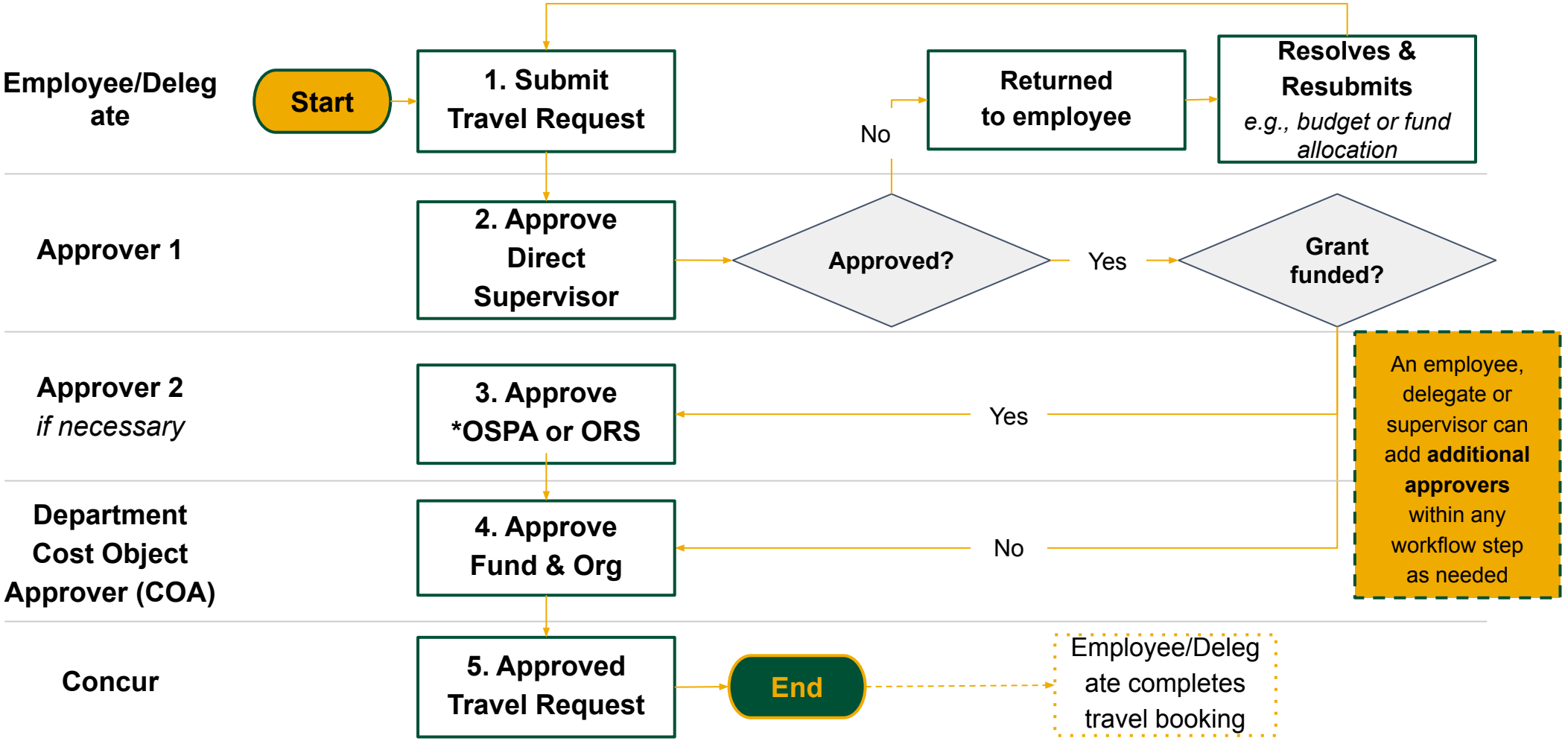


Expense Report Process



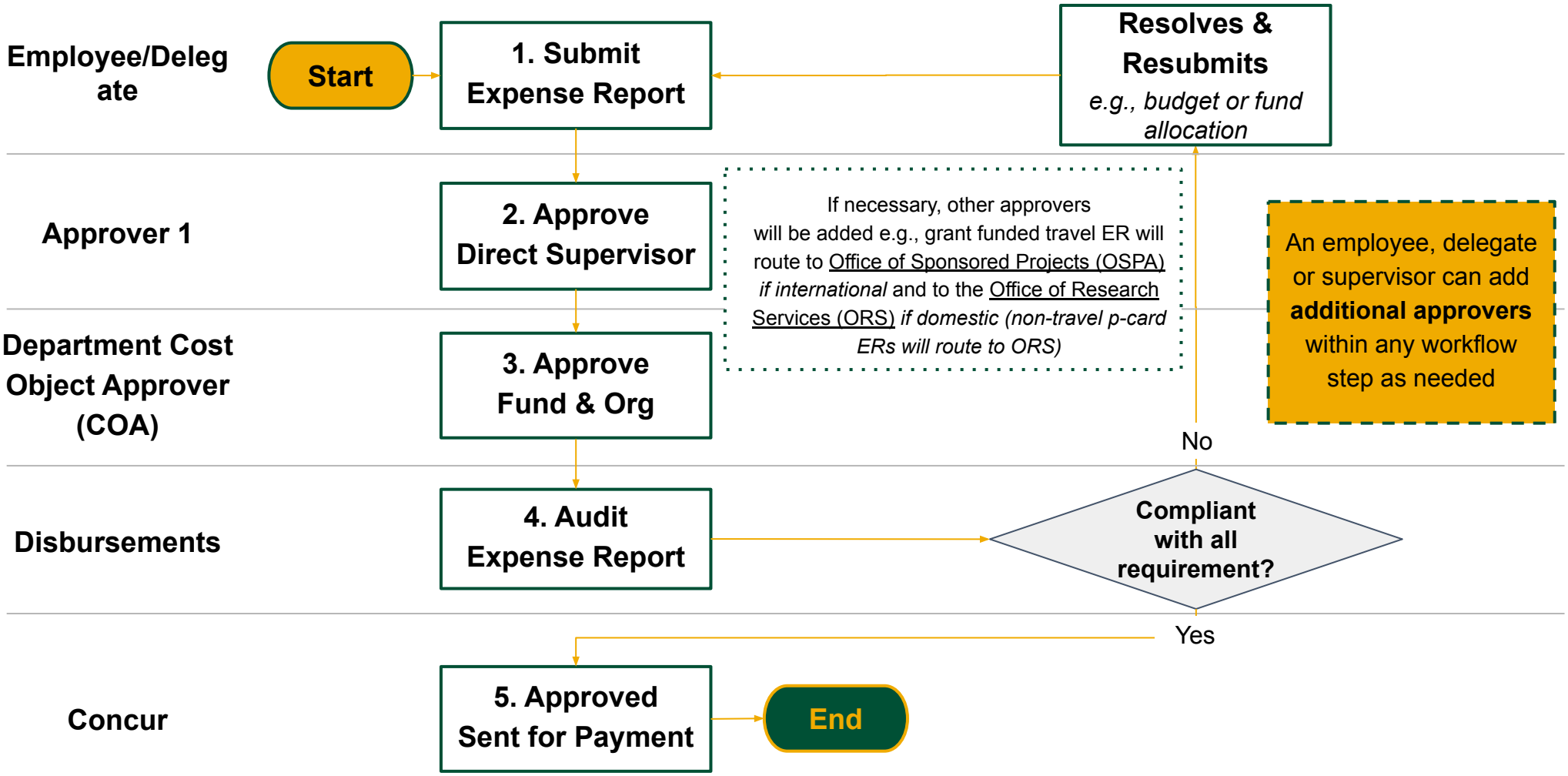
Request Approval Workflow

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

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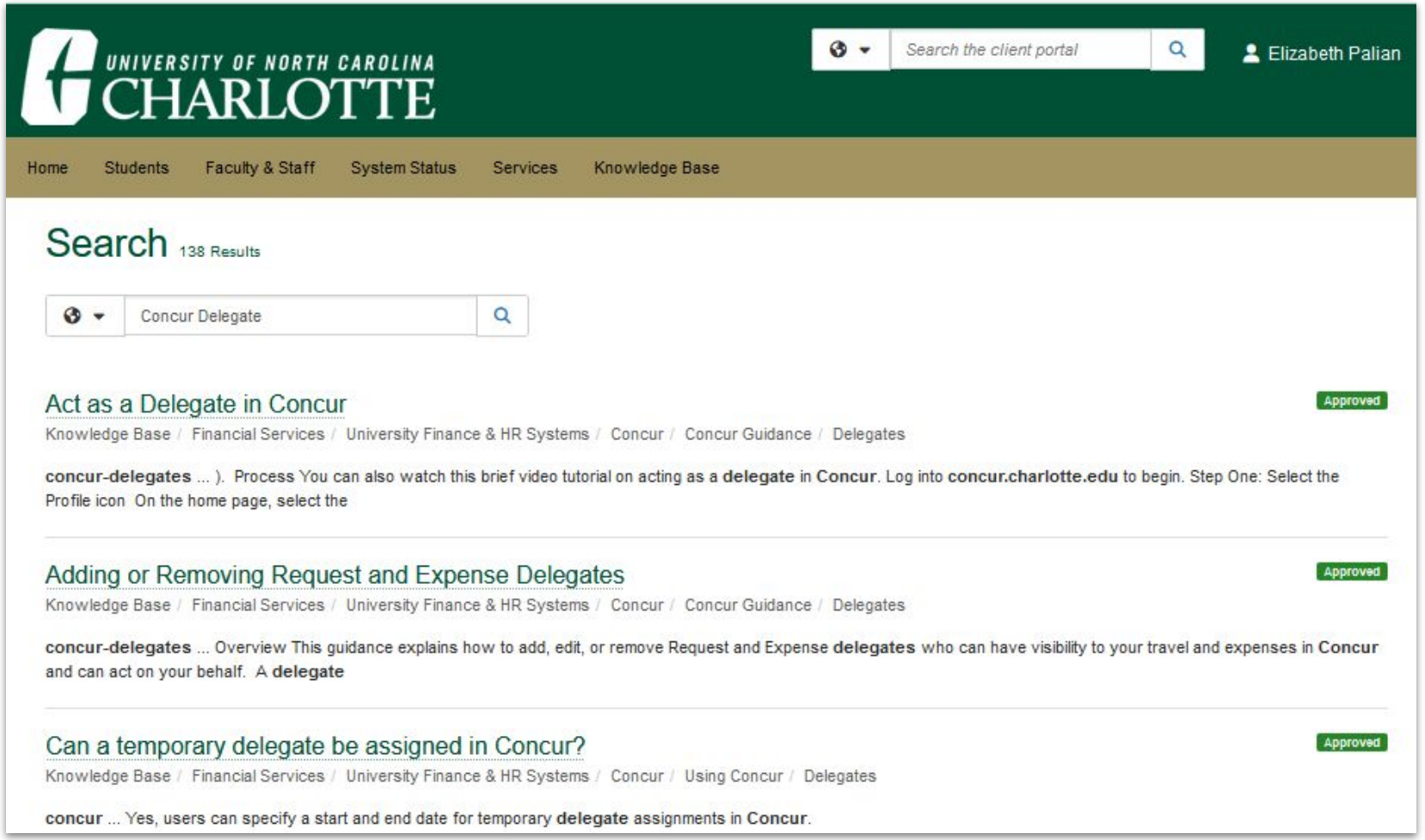
Additional details and resources are available on the Concur project page.

Knowledge Base



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