# 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

Very similar to the

Concur for Delegates

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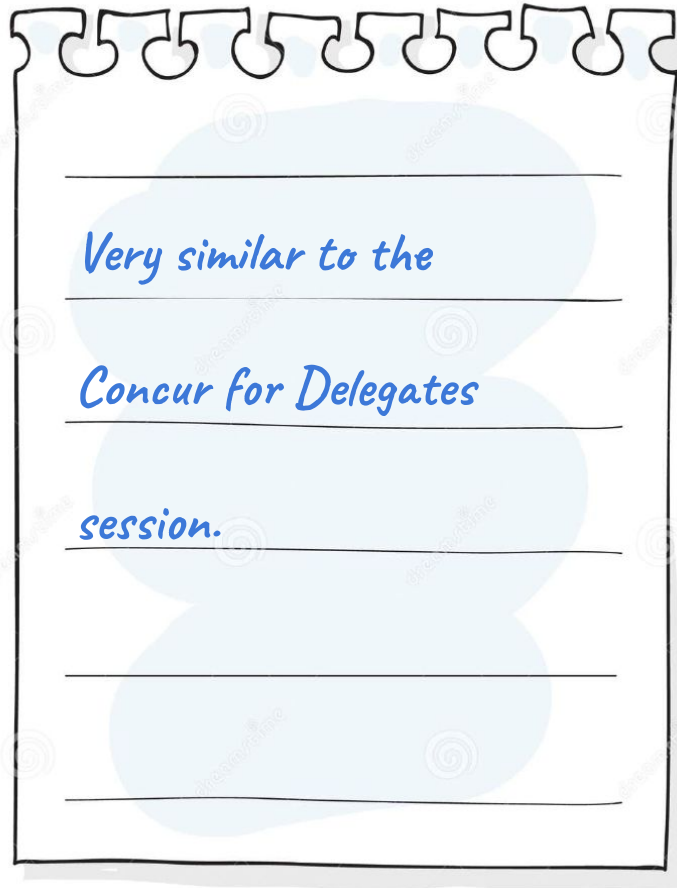
- **Resources**
- **Terminology:**
  - Request, Report; What is a Delegate
- **Homepage**
- **Profiles**
- **Travel Request process**
- **Expense Report process**
- **Approvals**
- **Mobile App**
- **Resources**

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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**

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Concur Homepage:Taskbar

Concur Homepage: Key Items
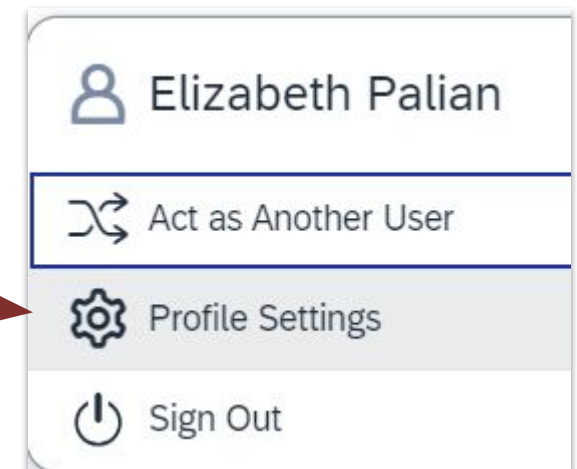
Your Concur Profile

- 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

SAP Concur   Home ⌄   Open Profile   EP

Elizabeth Palian

Act as Another User

4. Select Profile Settings   Profile Settings

Sign Out

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
⌄	Elizabeth	Grider	Elizabeth	Palian	⌄
		☐ No Middle Name			

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Profile Options:
Verify Your Email Address

Select Verify

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	egpalian@charlotte.edu	✓ 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

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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	✎

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE
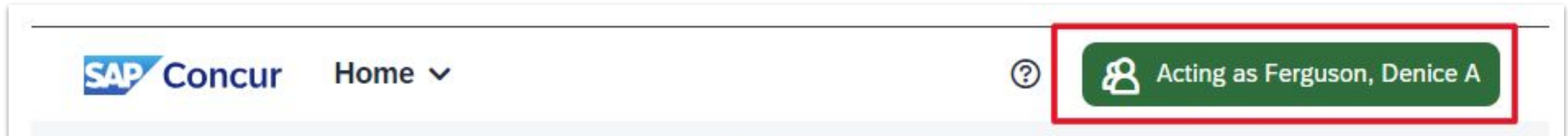
Add Delegates: Select Tasks

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

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

Complete the fields

Travel Request Process
Complete the fields

Will research (regardless of funding source) be conducted? *

No ⌄

Destination City *

Savannah, Georgia ✕ ⌄

Destination Country *

UNITED STATES (US) ✕ ⌄

Does this trip contain personal travel? *

No ⌄

Personal dates of travel

Chart | 1

(1) Chart

Division * | 2

(20) Business Affairs (Div) ✕ ⌄

College/Admin * | 3

(215) Business Affairs IT Support (Adm) ✕ ⌄

Department * | 4

(1130) Financial Systems Support (Dpt) ✕ ⌄

Sub-Department * | 5

(12601) BA Tech-Financial Systems Supp ✕ ⌄

Fund * | 6

(117505) Bus Aff Tech Fin Systems Supp ✕ ⌄

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

Select Create Request

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

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)

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

Travel Request Process

Travel Request Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

New Expense:Personal Car Mileage $21.44

Cancel Save

◐ Allocate   👤 Mileage Calculator

* Required field

Expected Transaction Date *

07/28/2024   📅

Trip End Date

07/31/2024

From Location ❓

9201 University City Blvd, Charlotte, NC 28223, US

To Location ❓

5501 Josh Birmingham Pkwy, Charlotte, NC 28208, USA

Distance *

32

Amount ❓

21.44

Currency

US, Dollar (USD)

Comment   0/2000

Reimbursement Rates
USD 0.67 per mile

Save   Cancel

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

Manage Travel Allowance (previously known as per diem)

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

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	☐	☐	☐	☐	☐	
Sun, 07/28/2024 Savannah, UNITED STATES	☐	☐	☐	☐	☐	$48.00
Mon, 07/29/2024 Savannah, UNITED STATES	☐	☐	☑	☐	☐	$47.00
Tue, 07/30/2024 Savannah, UNITED STATES	☐	☐	☐	☐	☐	$64.00
Wed, 07/31/2024 Savannah, UNITED STATES	☐	☐	☐	☐	☐	$48.00
					Total:	$207.00

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Travel Request Process

Travel Request Process

Expense Report Process

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

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
○	Nashville, TN -10/12/2024	333M	10/12/2024	10/16/2024	No	$2,778.44	$2
○	Savannah, GA - 8/1/24	333X	08/01/2024	08/03/2024	No	$1,249.44	$1
○	Savannah, GA - 7/28/24	333R	07/28/2024	07/31/2024	No	$1,313.44	$1

Cancel   **Create Report**

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

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

Amount Due (Departmental P-Card):
$1,448.00

Owed Company:
$0.00

Requested Amount:
$1,693.82

Total Paid By Company:
$1,693.82

Total Owed By Employee:
$0.00

Cancel   **Submit Report**

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

Attendees

Student Meals | $215.00

Attendees: 4

Add | Remove | Create Group | Copy from Request

	Attendee Name ↑≡
☐	Bonnie Cone
☐	Charlotte Mecklenburg
☐	Norm Niner
☐	Reese Colvard

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process
Allocate

Concur for Travelers Training

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Process

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Request Approval Workflow

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

Employee/Delegate

Start → 1. Submit Travel Request

Returned to employee

Resolves & Resubmits
e.g., budget or fund allocation

Approver 1

2. Approve Direct Supervisor → Approved? — No → Returned to employee

Approved? — Yes → Grant funded?

Approver 2
if necessary

3. Approve *OSPA or ORS — Yes

Department Cost Object Approver (COA)

4. Approve Fund & Org — No

An employee, delegate or supervisor can add **additional approvers** within any workflow step as needed

Concur

5. Approved Travel Request → End ⤏ Employee/Delegate completes travel booking

*Office of Sponsored Projects Administration or Office of Research Services

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Expense Report Approval Workflow

Employee/Delegate

Start → **1. Submit Expense Report**

Resolves & Resubmits
e.g., budget or fund allocation

Approver 1

2. Approve Direct Supervisor

If necessary, other approvers will be added e.g., grant funded travel ER will route to Office of Sponsored Projects (OSPA) *if international* and to the Office of Research Services (ORS) *if domestic (non-travel p-card ERs will route to ORS)*

An employee, delegate or supervisor can add **additional approvers** within any workflow step as needed

Department Cost Object Approver (COA)

3. Approve Fund & Org

Disbursements

4. Audit Expense Report

Compliant with all requirement?

No

Yes

Concur

5. Approved Sent for Payment → End

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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.

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

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

UNIVERSITY OF NORTH CAROLINA
CHARLOTTE

Thank you!

Need assistance with Concur?

Submit a service request form