



FINANCE AND OPERATIONS  
Finance and Budget

# *Concur*

*Travel and Expense Management*



# Quick Start Mini Guidebook

October 19, 2021

This is a pared-down version of the Concur Quick Start Guide available at: <https://finance.unc.edu/services/travel/concur/>. Editing was done by Robin Whitley, robin\_whitley@unc.edu, for ESE. Chapter 14 was added in from the Step-by-Step Guide.

It's still very long, but most of that is screenshots to help you find things.

You can use the Bookmarks to navigate. (Can't see them? Consult the screenshot below to turn them on.)

## Contact Information

University Travel Office

Phone: 919-962-0210

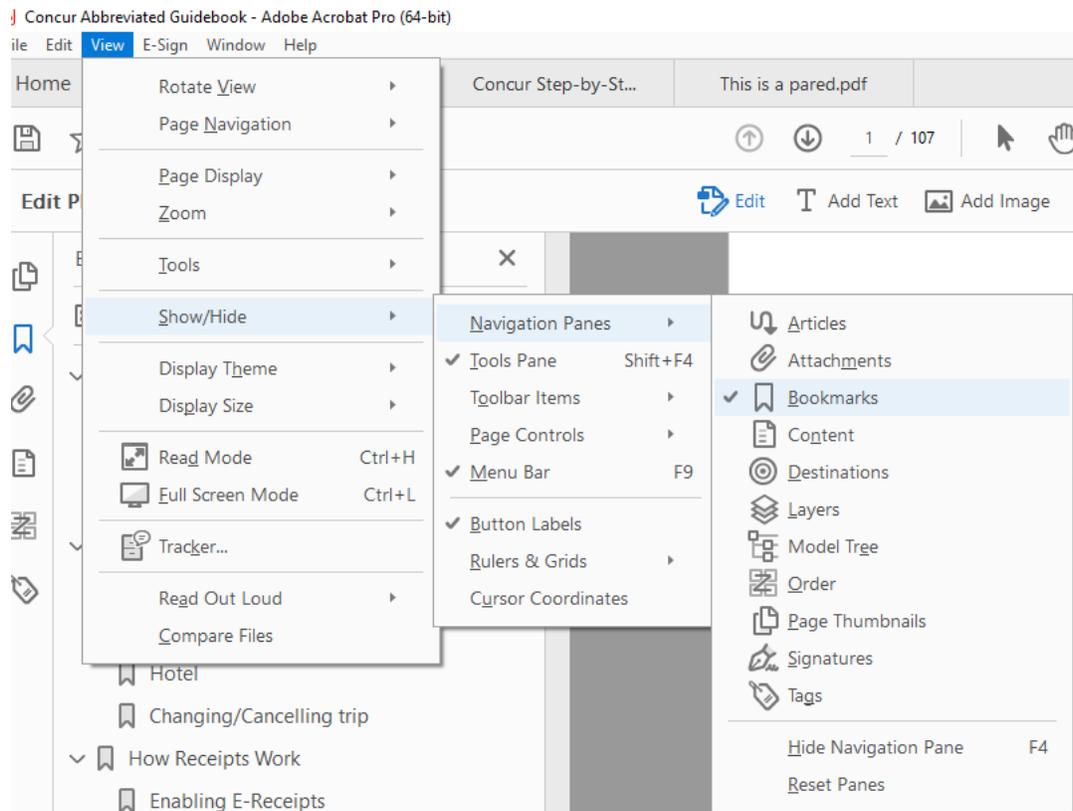
Email: [concur@unc.edu](mailto:concur@unc.edu)

Webpage: [finance.unc.edu/services/travel/](https://finance.unc.edu/services/travel/)

## World Travel

Phone: 877-602-4950

Email: [uncch\\_travel@worldtravelinc.com](mailto:uncch_travel@worldtravelinc.com)



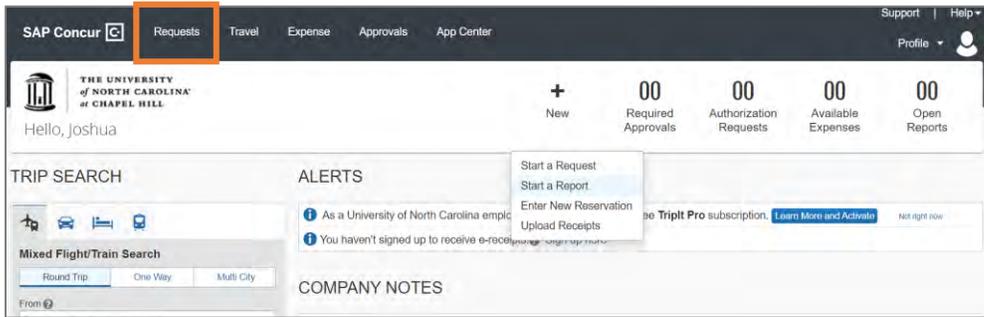
# Creating a Travel Request

In advance of any University business travel which includes airfare, lodging, and/or meal per diem, you should create and submit a travel request prior to making any travel arrangements.

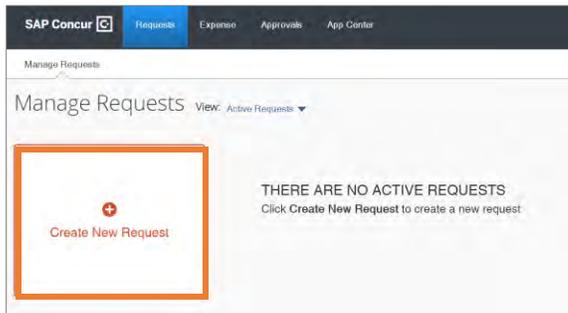
## Creating a New Travel Request

Follow these steps to create a travel request:

1. From the Concur home page, click the **Requests** tab.



2. Click the **Create New Request** tile.



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

### Notes:

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

4. Click the **Create** button.

**Result:** A Request ID number will be generated, and you can add any anticipated travel expenses. The Request ID number replaces the CABS Number when using the Direct-Billing option with the University’s travel agency.

## Adding Personal Travel (if applicable)

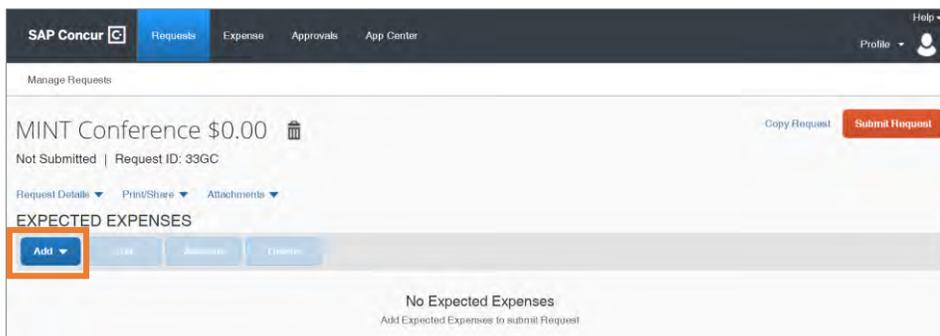
If the travel request will include personal travel it should be documented when creating and submitting the request.

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

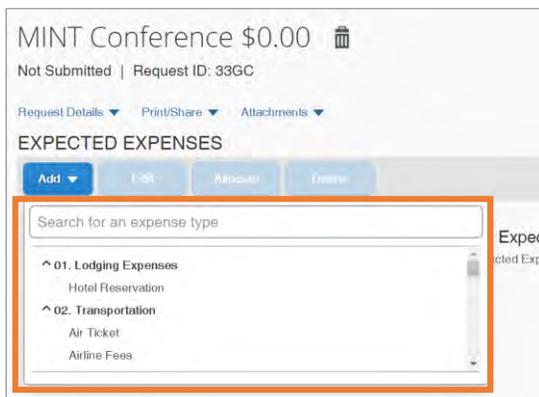
## Adding Expenses to a Travel Request

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

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



8. Select the type of expense you need to add.



## Adding Lodging Expenses to a Travel Request (if applicable)

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

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

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

10. Click the **Save** button.

The screenshot shows a form titled "New Expense: Hotel Reservation". It has a "Cancel" button and a "Save" button (highlighted with a red box). The form contains the following fields:

- City \* (required)
- Date (09/01/2020)
- At (hh:mm A)
- Vendor (Search for Vendor dropdown)
- Date (09/04/2020)
- At (hh:mm A)
- Comment (text area)
- Estimated Amount \* (required)
- Currency (US, Dollar)

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

The screenshot shows the "MINT Conference \$500.00" page. It includes a "Copy Request" button and a "Submit Request" button. The page displays the "EXPECTED EXPENSES" section with the following table:

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00

Estimated Total: \$500.00

11. If you need to add another anticipated expense, click the **Add** button.

If you are done adding anticipated expenses, click the **Submit Request** button.

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

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

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

New Expense: Air Ticket

Cancel Save

Round Trip One Way

Outbound

From \* To \*

Date \* Depart at \* Comment

09/01/2020 Depart at hh:mm A

Return

Date \* Arrive at \* Comment

09/04/2020 Arrive at hh:mm A

Estimated Amount \* Currency

US, Dollar

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

MINT Conference \$975.00

Not Submitted | Request ID: 33GC

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/>	Air Ticket	Raleigh (RDU) - Tulsa (TUL) : Round Trip	09/01/2020	\$475.00	\$475.00

Estimated Total: \$975.00

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

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

If you selected Daily Allowance Meals from step 8, the Travel Request must include Federal Funding (or an approved exception). The Federal Per Diem rates may be utilized in place of the North Carolina Per Diem Rates. To add the Federal Per Diem rates, follow the steps below to add “Daily Allowance” to your Travel Request:

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

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

17. Click the **Save** button.

New Expense: Daily Allowance \$0.00  
09/01/2020

Allocate

Request/Trip Start Date \* 09/01/2020

Request/Trip End Date \* 09/04/2020

Destination City \* US - Tulsa, Oklahoma

Estimated Amount

Currency US, Dollar

Comment

Cancel Save

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

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

MINT Conference \$1,167.50

Not Submitted | Request ID: 33GC

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/> Air Ticket	Raleigh, North Carolina - Tulsa, Oklahoma	09/01/2020	\$475.00	\$475.00
<input type="checkbox"/> Daily Allowance	Tulsa, Oklahoma	09/01/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

## Adding a Travel Cash Advance Request

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

1. Follow steps 1 to 8 from **Creating a New Travel Request**.
2. Click the **Request Details** dropdown link.
3. Click the **Add Cash Advance** from the dropdown.

Details	Date	Amount	Requested
Tulsa, Oklahoma	08/07/2020	\$500.00	\$500.00
Raleigh, North Carolina - Tulsa, Oklahoma	08/07/2020	\$475.00	\$475.00
Tulsa, Oklahoma	08/07/2020	\$192.50	\$192.50
Estimated Total: \$1,167.50			

**Result:** The New Cash Advance popup window will appear.

4. Enter the amount of the cash advance.
5. Click the **Add Cash Advance** button.

Cash Advance Amount \* 500.00  
Currency \* US, Dollar

Cancel Add Cash Advance

6. Click the ^ to expand the Alerts section to review the notice.
7. Click **View** in the Cash Advances section.

Alerts: 2

REQUEST

NOTICE: Any cash advance made by the University is a loan and the recipient is personally responsible for all monies advanced to them. Cash Advances must be reconciled on the expense report within thirty (30) days of trip completion and any unspent portions may be deducted from the recipient's wage via payroll. APPROVER NOTICE: This Request includes a Cash Advance. By approving the Request you are also approving the Cash Advance. View

CASH ADVANCES

Missing required field: Cash Advance Justification View

MINT Conference \$1,167.50  
Not Submitted | Request ID: 33GL

CASH ADVANCES: 1  
Amount: \$500.00  
\$500.00

- In the Cash Advance Justification field, enter the justification for the cash advance request. Please provide as much detail as possible in the justification field.

MINT Conference Cancel Save

10/05/2020

Cash Advance Timeline Manage Attachments

Details Expenses

Cash Advance Amount \* 500.00 Currency \* US, Dollar Request/Trip Start Date \* Required field 08/07/2020

Request/Trip End Date 08/10/2020 Requested Disbursement Date MM/DD/YYYY

Cash Advance Name MINT Conference

Cash Advance Justification \* Cash Advance Justification

**Note:** You may click the Quick Help icon next to the Cash Advance Justification field for examples of allowable reasons for a cash advance

- Click the **Save** button.

**Result:** The cash advance has been added to the Travel Request and the alert has been cleared.

## Adding Attachments to a Travel Request

Some travel will require documentation to be submitted along with a travel request. Follow these steps to add an attachment to a travel request:

- Open the Travel Request if it is not already selected.
- Click the **Attachments** drop-down link.
- Click **Attach Documents** from the drop-down options.

MINT Conference \$1,167.50 Copy Request Submit Request

Not Submitted | Request ID: 33GC

Request Details Print/Share Attachments

EXPECTED EXPENSES Attach Documents

Add Edit Attachments Attach

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Tulsa, Oklahoma	09/01/2020	\$500.00	\$500.00
<input type="checkbox"/>	Air Ticket	Raleigh, North Carolina - Tulsa, Oklahoma	09/01/2020	\$475.00	\$475.00
<input type="checkbox"/>	Daily Allowance	Tulsa, Oklahoma	09/01/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

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

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



5. Select the file you want to attach.

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

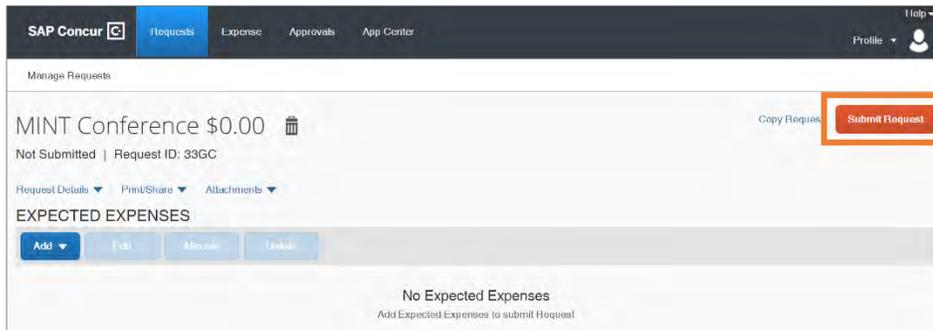
**Note:** Once a document is attached, click on the **Attachments** drop-down link to view, delete, or attachment more documents. If attaching multiple documents, the files will be merged into one and cannot be separated.

## Submitting a Travel Request

If you are acting as a personal delegate and creating a Travel Request on behalf of another user, you will not have the option to submit the travel request. Delegates may prepare the travel request and then use the Notify feature to alert the traveler when the request is ready to be submitted.

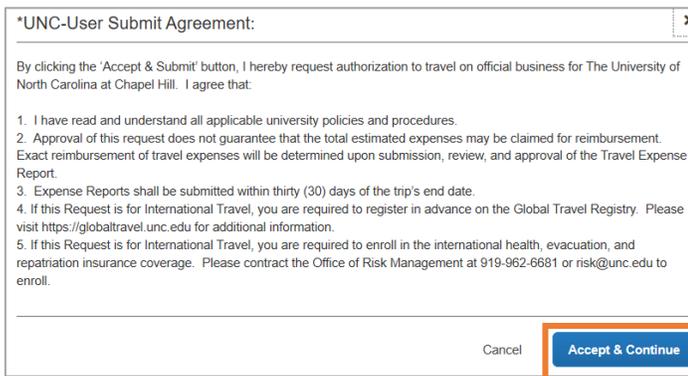
### Submitting a Travel Request:

1. Click the Submit Request button in an open request.



**Result:** The UNC – User Submit Agreement pop-up will appear.

2. Read the agreement carefully and click the **Accept & Continue** button when ready.



**Result:** The Request status will change to Submitted and the Request will move to the first step of the approval workflow.

## Making Reservations and Booking Travel

Booking a Trip on Concur Travel is similar to how you would book a personal trip online. Users of the system can book travel themselves as the Traveler or utilize a designated Travel Assistant/Arranger to make the booking and travel reservations.

### Booking a Flight

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

1. From the Concur Homepage, click the **Travel** tab.  
**Result:** by default, the Flight/Train tab option will be selected.
2. Select one of the following:
  - **Round Trip**
  - **One Way**
  - **Multi City**

TRIP SEARCH

Mixed Flight/Train Search

Round Trip One Way Multi City

From ?  
Departure city, airport or train station  
Find an airport | Select multiple airports

To ?  
Arrival city, airport or train station  
Find an airport | Select multiple airports

Search

Show More

- In the **From** and **To** fields, enter the cities for travel.  
**Note:** When you enter a city, airport name, or airport code, the system will automatically search for a match. You can also use the Find an airport link or Select multiple airport links as needed.
- In the **Depart** and **Return** fields, select the appropriate dates and times.
- If you need a hotel and/or car rental mark the **Pick-up/Drop-off car at airport** and/or **Find a Hotel**. Otherwise, continue to the next step.
- Click the **Search** button.

TRIP SEARCH

Mixed Flight/Train Search

Round Trip One Way Multi City

From ?  
RDU - Raleigh/Durham Airport - Raleigh/Durham, NC  
Find an airport | Select multiple airports

To ?  
LAX - Los Angeles Intl Airport - Los Angeles, CA

Depart ?  
04/19/2021 depart 09:00 am ± 2

Return ?  
04/23/2021 depart 05:00 pm ± 2

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

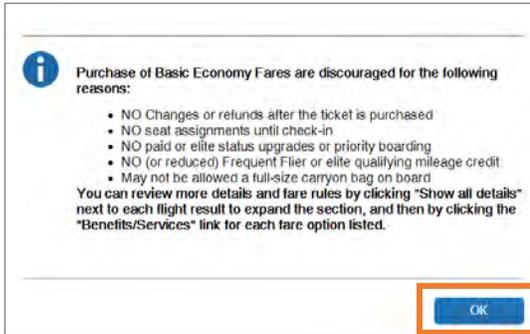
Class ? Search by  
Economy class Price

Specify a carrier ?

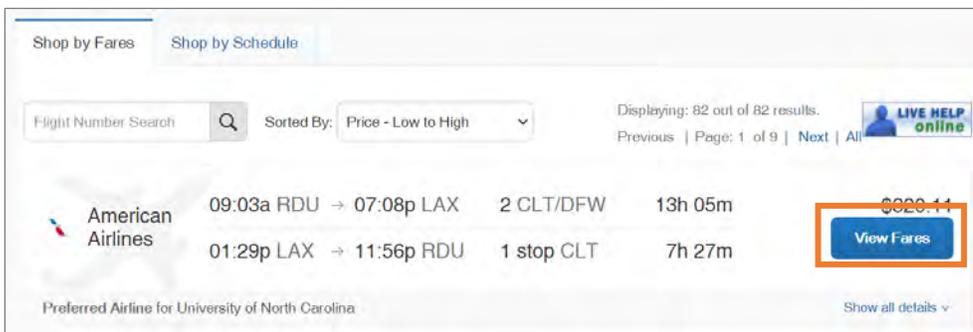
Search

**Result:** A pop-up window to review Basic Economy Fares information will appear and a listing of reservations options.

7. Review the Basic Economy Fares information.
8. Click the **Ok** button.

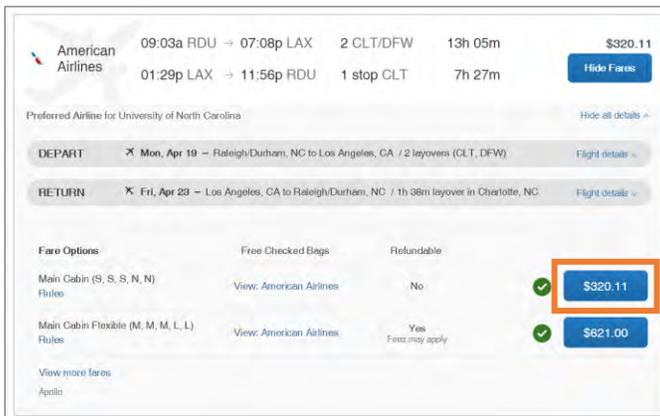


9. Click the **View Fares** button next to the preferred itinerary to view available booking options



10. Click the **blue fare button** that shows the amount of the fare to proceed.

**Result:** The Review and Reserve Flight page will appear.



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

**Result:** The Review and Reserve Flight page will appear.

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



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

Flight	Seat
AA 1906 Main Cabin Flexible (M)	Select a seat
AA 665 Main Cabin Flexible (M)	Select a seat
AA 969 Main Cabin Flexible (M)	Select a seat
AA 1925 Main Cabin Flexible (L)	Select a seat
AA 494 Main Cabin Flexible (L)	Select a seat

12. Select a **Payment Method**.

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



SELECT A METHOD OF PAYMENT

How would you like to pay?  
Please choose a credit card

\* Indicates credit card is a company card

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

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

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

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

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

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

TOTAL ESTIMATED COST	
Air <a href="#">View Fare Rules</a>	
Airfare quoted amount:	\$533.30 USD
Taxes and fees:	\$87.70 USD
Total Estimated Cost:	\$621.00 USD
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.	
<input type="button" value="Next &gt;&gt;"/> <input type="button" value="Cancel Trip"/>	

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

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

### Trip Booking Information

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

Trip Name	Trip Description (optional)
This will appear in your upcoming trip list. Trip from Raleigh/Durham to Los Angeles	Used to identify the trip purpose

Concur Request ID [Required]

- Click the **Next** button.

**Result:** The Trip Confirmation page will appear.

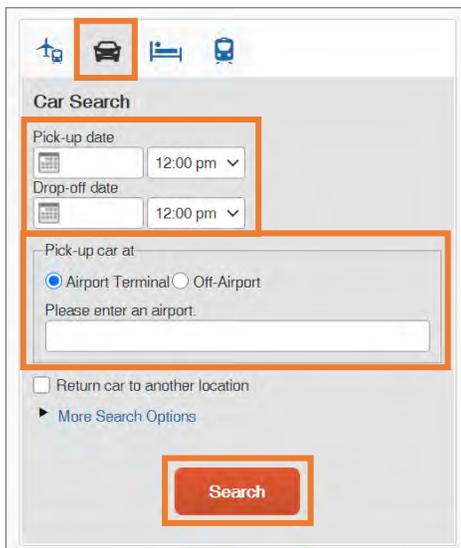
- Click the **Purchase Ticket** button to confirm the itinerary.

TOTAL ESTIMATED COST	
Air <a href="#">View Fare Rules</a>	
Airfare quoted amount:	\$533.30 USD
Taxes and fees:	\$87.70 USD
Total Estimated Cost:	\$621.00 USD
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	
Almost done... Please confirm this itinerary.	
<input type="button" value="Display Trip"/> <input type="button" value="Previous"/> <input type="button" value="Purchase Ticket &gt;&gt;"/> <input type="button" value="Cancel Trip"/>	

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

## Booking a Rental Car

1. Complete one of the following:
  - If your travel does not require airfare and you only need to request a car rental, click the **Car** icon.
  - Or
  - If you marked the check box Pick-up/Drop Off Car at airport from step five in Booking a Flight continue to step 6.
2. Enter your **Pick-up and Drop-off dates and times**.
3. In the Pick-up car at section select one of the following:
  - Select **Airport Terminal** and enter the City or the Airport Code.
  - Or
  - Select **Off-Airport** and enter, or search for the location.
4. Mark the check box **Return car to another location** if the Drop-off location will be different from the Pick-Up location and select the appropriate location.
5. Click the **Search** button.



The screenshot shows a 'Car Search' form with several elements highlighted by orange boxes:

- The **Car** icon in the top navigation bar.
- The **Pick-up date** and **Drop-off date** fields, each with a time dropdown set to 12:00 pm.
- The **Pick-up car at** section, which includes radio buttons for **Airport Terminal** (selected) and **Off-Airport**, and a text input field labeled 'Please enter an airport:'.
- The **Search** button at the bottom of the form.

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

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

Displaying: 9 out of 112 results. ?



**Intermediate Car - \$34.75 per day (Apollo)**

Automatic transmission  
 Unlimited miles, Pick-up: Terminal: RDU  
 Adults: 4, Large bags: 1, Small bags: 2\*\*  
 (Corporate rate)

Total cost\*

**\$202.03**

Preferred Car Vendor for University of North Carolina / E-Receipt Enabled ?

[Location details](#)

**Result:** The Review and Reserve Car page will appear.

7. Provide any rental car preferences and driver information, as necessary.

**Note:** In the Travel Details section, you can print/email the itinerary, change, or cancel the reservation.

8. Click the **Reserve Car and Continue** button.

Review and Reserve Car

**REVIEW RENTAL CAR**  
 Enterprise Car Rental [Location Details](#)

Type	Pick-up	Drop-off
Intermediate Car	Airport Terminal	Airport Terminal
Features	RDU: Raleigh/Durham 12:00 pm Mon, 04/19/2021	RDU: Raleigh/Durham 12:00 pm Fri, 04/23/2021

**PROVIDE RENTAL CAR PREFERENCES**

Your preferences and comments will be passed to the rental car agency.  
 Comments (30 character max)

**ENTER DRIVER INFORMATION**

Ensure the name below matches the I.D. you have with you on the day of pick-up. ?

Driver [Edit](#) | [Review all](#)

Name: William Testa Newer Phone: 444-333-5555 Email: [chuffman@westtravelinc.com](mailto:chuffman@westtravelinc.com)

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

No Program selected

**REVIEW PRICE SUMMARY**

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$34.75	Apr 19 - Apr 23	\$202.03*
Total Estimated Cost: \$202.03			
Total Due Now: \$0.00**			

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

Back
**Reserve Car and Continue**

**Result:** The Travel Details Page will appear.

9. Click the **Next** button.

**Result:** The Trip Booking Information page will appear.

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

11. Click the **Next** button.

**Trip Booking Information**

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

<p><b>Trip Name</b> This will appear in your upcoming trip list.</p> <input type="text" value="Car/Hotel Reservation"/>	<p><b>Trip Description (optional)</b> Used to identify the trip purpose.</p> <input type="text"/>
---	---

Concur Request ID (Required)

**Result:** The Trip Confirmation page will appear.

12. Review the trip details.

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

TOTAL ESTIMATED COST	
Car:	\$202.03 USD
Total Estimated Cost:	\$202.03 USD

Almost done... Please confirm this itinerary.

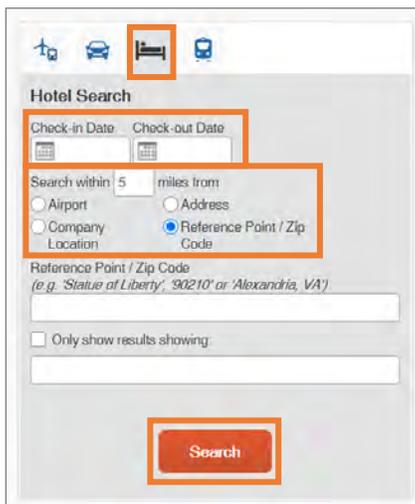
[Display Trip](#)
[<< Previous](#)
[Confirm Booking>>](#)
[Cancel Trip](#)

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

## Booking a Hotel

1. Complete one of the following:
  - If your travel does not require airfare and you only need to request hotel lodging, click the **Hotel** icon.
  - Or
  - If you marked the check box, **Find a Hotel** from step five in Booking a Flight continue to step 4.
2. Enter the **Check-in** and **Check-out Dates**.
3. Enter the search radius.

**Note:** You can choose to search near an airport, an address, or near another location.
4. Click the **Search** button.

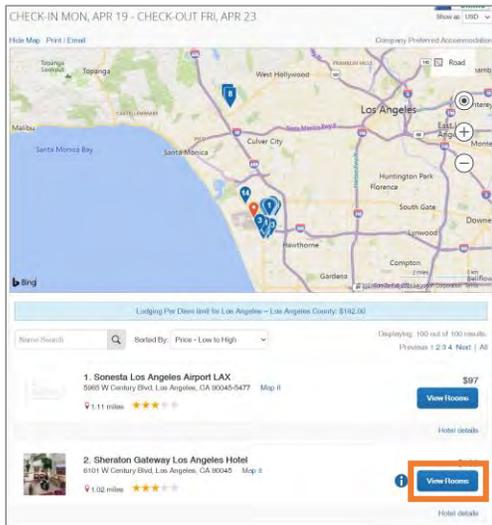


The screenshot shows a 'Hotel Search' form. At the top, there are four icons: a plane, a car, a hotel, and a train. The hotel icon is highlighted with an orange box. Below the icons, the form has two date pickers labeled 'Check-in Date' and 'Check-out Date', both highlighted with an orange box. Underneath, there is a section for search radius: 'Search within 5 miles from'. Below this are four radio button options: 'Airport', 'Address', 'Company Location', and 'Reference Point / Zip Code'. The 'Reference Point / Zip Code' option is selected and highlighted with an orange box. Below these options is a text input field for the 'Reference Point / Zip Code' with the example '(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')'. At the bottom of the form is a 'Search' button, also highlighted with an orange box.

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

**Result:** The Search results will appear, and you have the option to filter and or sort the search results.
6. Review the search results:
  - Click the **hotel picture** to see more images.
  - Click **Hotel Details** to see contact information, street address, cancellation policy and information about the facility.
  - Click **View Rooms** to see available room options and rates, amenities, and rules for cancellation policy.

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

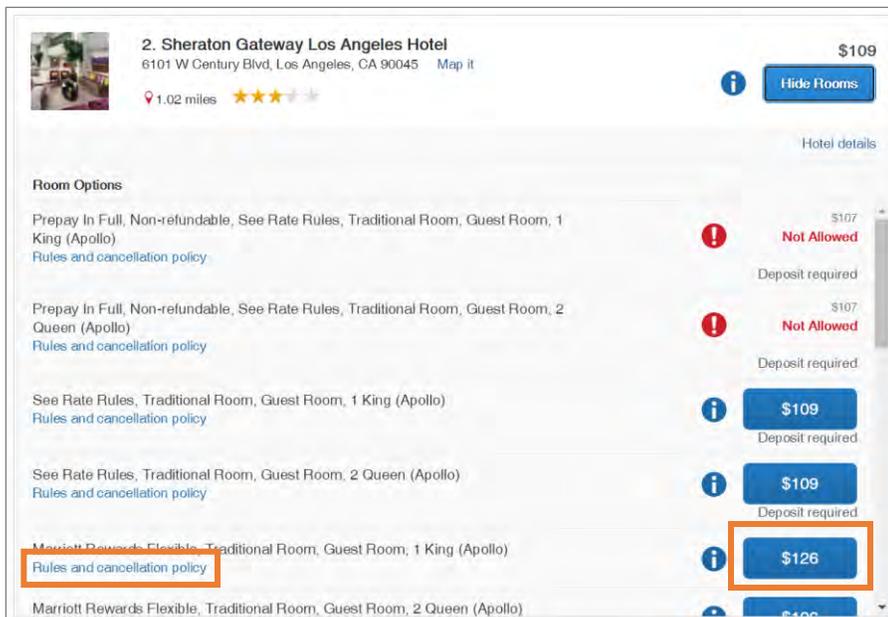


**Result:** The Review and Reserve Hotel page appears.

- Review the hotel rate rules and cancellation policies.

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

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



**Result:** The Review and Reserve Hotel page appears.

- Provide any hotel room preferences, if applicable.
- Select the **Method of Payment**.
- Mark the check box to accept the rate details and cancellation policy.

13. Click the **Reserve Hotel and Continue** button.

**Result:** The Travel Details page appears.

The screenshot shows two main sections of a booking page. The first section, titled "SELECT A METHOD OF PAYMENT", includes a dropdown menu with the text "Please choose a credit card." and an "Add credit card" link. Below this is a note: "\* Indicates credit card is a company card". The second section, titled "ACCEPT RATE DETAILS AND CANCELLATION POLICY", contains a scrollable area for "Sheraton Gateway Los Angeles Hotel" with the text "Please review the rate rules and restrictions before continuing." and "The hotel provided the following information: TOTAL RATE: 606.22 USD, EXTRA PERSON: AFTER 2 PEOPLE - 20.00 USD PER EXTRA PERSON PER NIGHT, RATE CHANGES OVER DURATION OF STAY". Below the scrollable area is a checkbox labeled "I agree to the hotel's rate rules, restrictions, and cancellation policy". At the bottom of the page are two buttons: "Back" and "Reserve Hotel and Continue".

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

The screenshot shows the "Trip Booking Information" form. It includes a header "Trip Booking Information" and a sub-header "The trip name and description are for your record keeping convenience." Below this are two input fields: "Trip Name" (with the note "This will appear in your upcoming trip list.") and "Trip Description (optional)" (with the note "Used to identify the trip purpose"). Below these fields is a "Concur Request ID [Required]" field. The form is designed with a clean, white background and orange borders around the input fields.

15. Click the **Next** button.

16. Click the **Confirm Booking** button.

**Result:** The Trip Confirmation page appears.

17. Review the details of the trip and make any changes if necessary.

18. Click the Confirm Booking button.

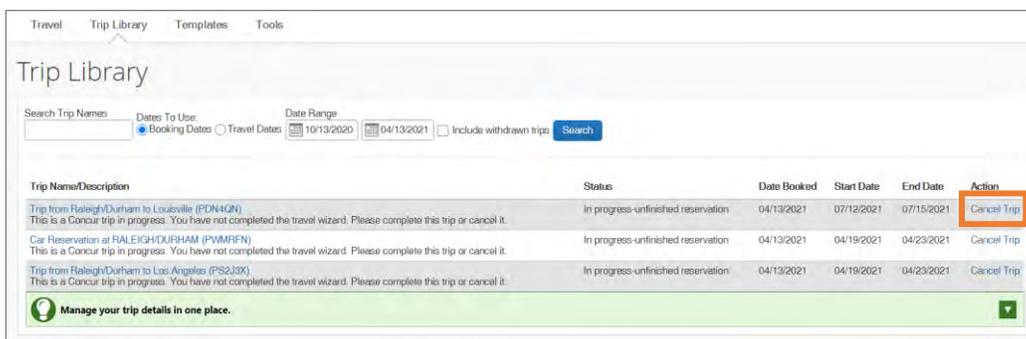
**Result:** The Finished page will appear stating that you have successfully booked your trip.

## Changing or Canceling a Trip

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

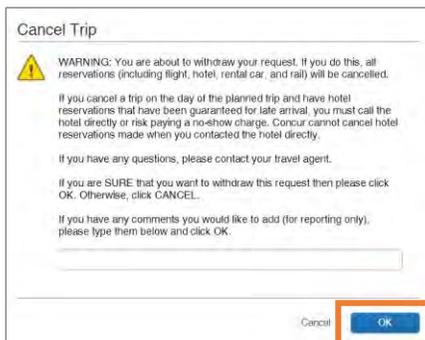
To cancel an entire trip, follow these steps:

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



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

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



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

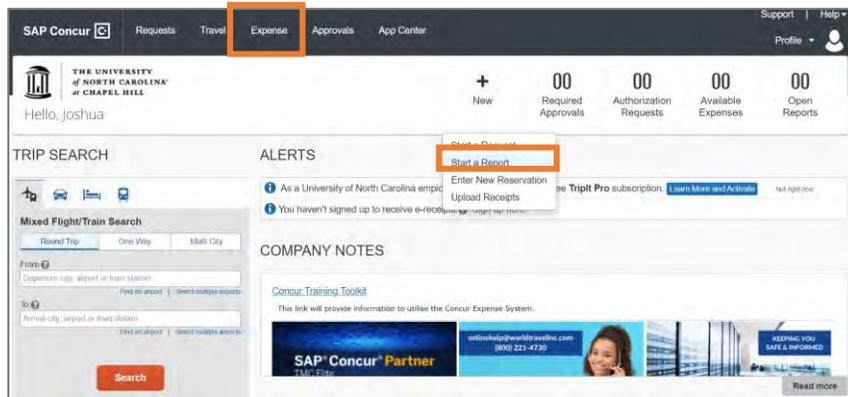
**Note:** If you are unable to change or cancel your Concur World Travel reservation, contact your World Travel, Inc agent for assistance.

# Creating an Expense Report

## Creating a New Expense Report without a Travel Request

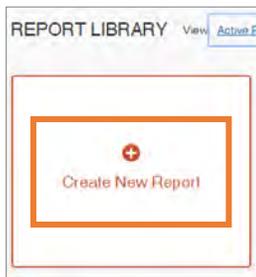
Follow these steps to create a new expense report without a travel request:

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



**Result:** The Manage Expenses page will appear.

2. Click the **Create New Report** tile in the Report Library section.



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

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

4. Click the **Create Report** button.

The screenshot shows the 'Create New Report' form in SAP Concur. The form is titled 'Create New Report' and has a close button (X) in the top right corner. It contains several required fields (marked with an asterisk) and optional fields. The 'Policy' field is set to 'UNC-General Expense Policy'. The 'Report Name' field is empty. The 'Report/Trip Purpose' field is empty. The 'Report/Trip Start Date' field is set to 'MMDD/YYYY'. The 'Report/Trip End Date' field is set to 'MMDD/YYYY'. The 'Traveler Type' field is empty. The 'Trip Type' field is empty. The 'Does this trip include personal travel?' field is empty. The 'Dates of personal travel' field is empty. The 'Is this reporting federally funded?' field is empty. The 'Business Unit' field is set to 'Search by Code'. The 'Dept ID' field is empty. The 'Fund' field is set to 'Search by Code'. A 'Create Report' button is highlighted with a red box at the bottom right of the form.

## Creating a New Expense Report from a Travel Request

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

1. Open the Active Requests page by clicking on the **Requests** tab.

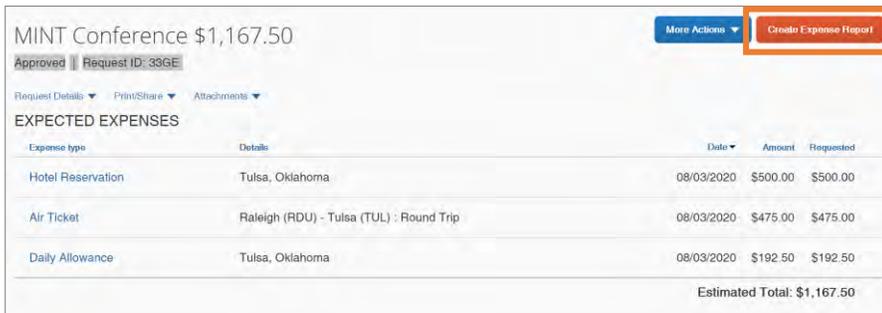
The screenshot shows the SAP Concur 'Requests' page. The navigation bar at the top includes 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The 'Requests' tab is highlighted. The main content area is divided into several sections: 'TRIP SEARCH' with a 'Mixed Flight/Train Search' form; 'ALERTS' with two messages; 'COMPANY NOTES' with a 'Concur Training Toolkit' link; and 'MY TASKS' with three task cards: '00 Required Approvals', '00 Available Expenses', and '00 Open Reports'. The 'MY TASKS' section also includes a 'Show More' button.

**Result:** The Active Requests page will appear.

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



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



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



4. Then continue to follow the steps noted for adding available expenses.

## Adding Available Expense Transactions

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

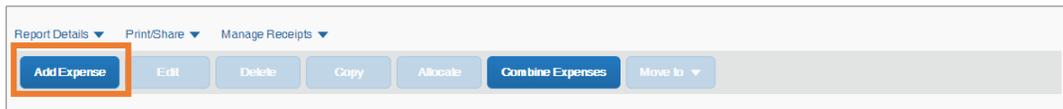
**Note:** The payment type for T&E Card transactions and Airfare Direct Bill transactions will automatically be assigned and cannot be changed.

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

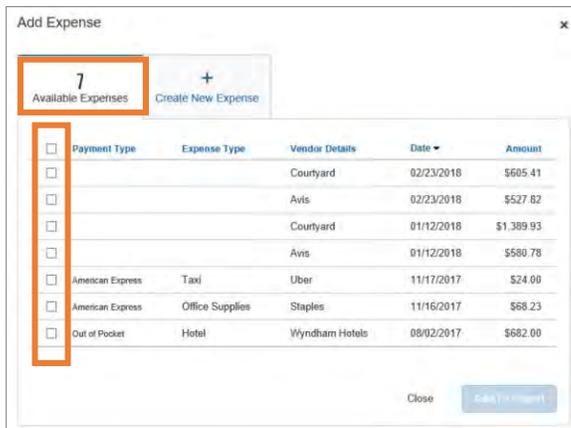
### From an open expense report

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

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



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

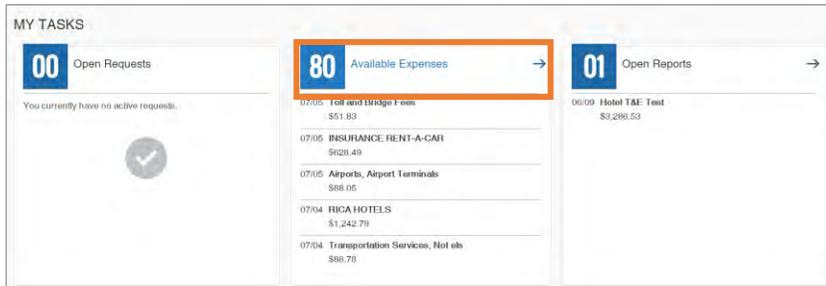


3. Click the **Add to Report** button.

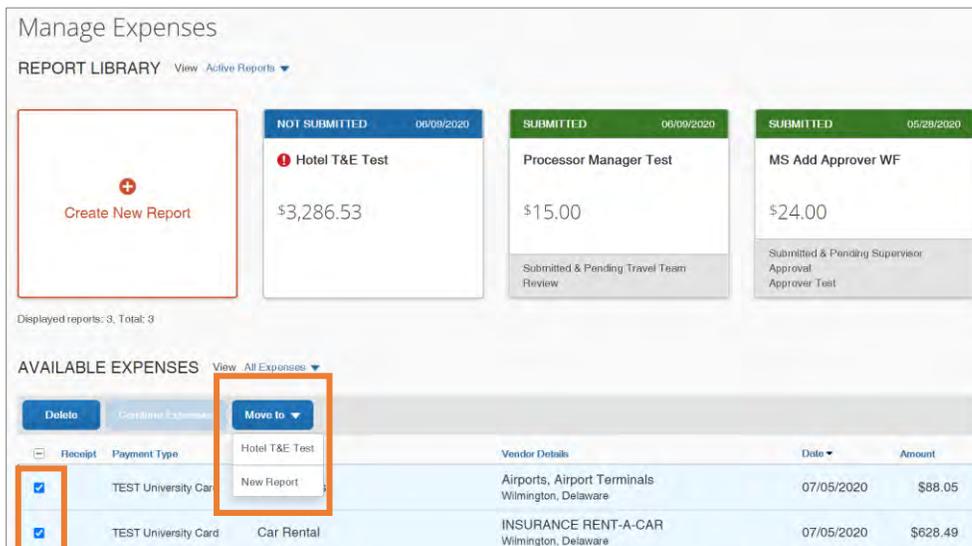
## From the Available Expense section

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

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



2. From the Available Expenses section (you might need to scroll down) mark the checkbox next to the Available Expense(s) you want to add to an existing expense report or new report.
3. Click the **Move to** button.
4. Select the Expense Report you want to add the Available Expense(s) to or select New Report to create a new report.



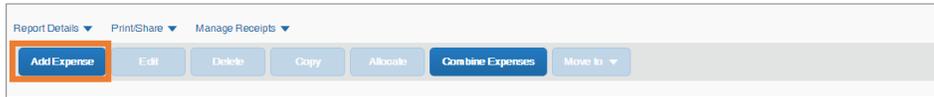
**Result:** Depending on the action you select; one of two results will occur:

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

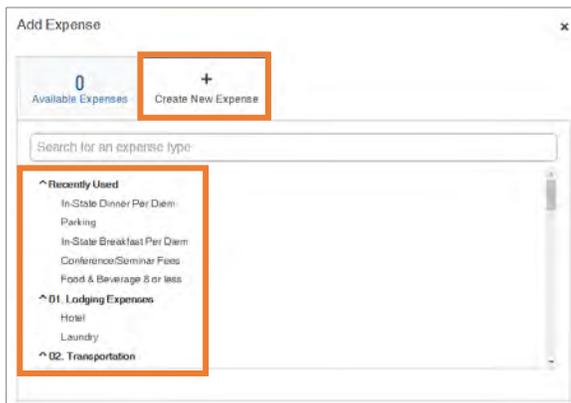
## Adding Out-of-Pocket Expenses

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

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

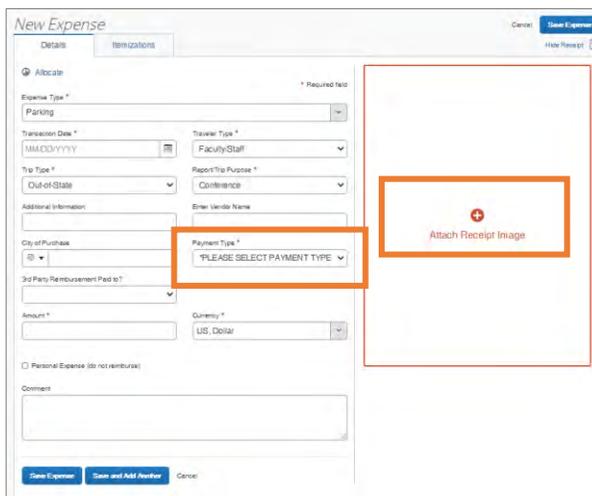


2. Click the **Create New Expense** tab.
3. Search for or select the appropriate expense type from the list.



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

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



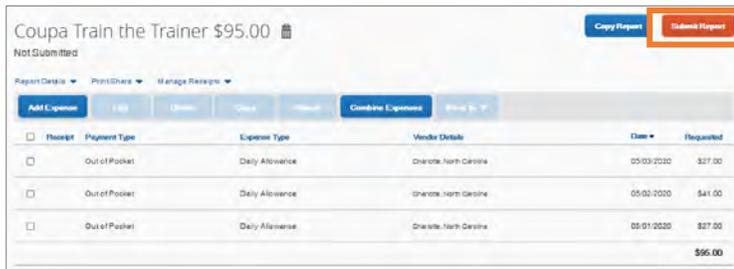
**Note:** If the expense requires itemization, click the Itemization tab.

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

## Submitting an Expense Report

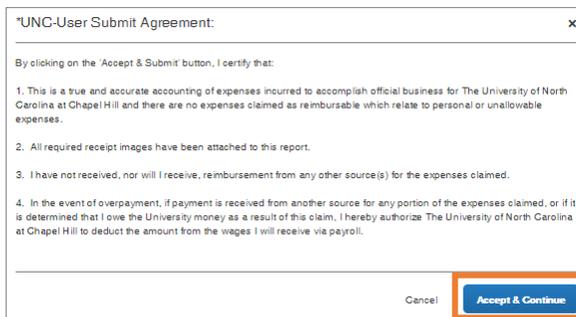
After reviewing your expenses and attaching your receipts, you will need to submit your expense report. If you are acting as a personal delegate and creating an Expense Report on behalf of another user, you will not have the option to submit the expense report. Delegates can prepare the expense report,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

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



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

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



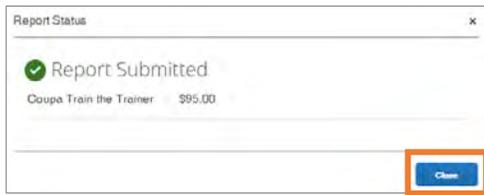
**Result:** A Report Totals pop-up window will appear. This displays the total amounts, the amount the University (company) will pay, and/or how much the employee owes the University.

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



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

5. Click the **Close** button.

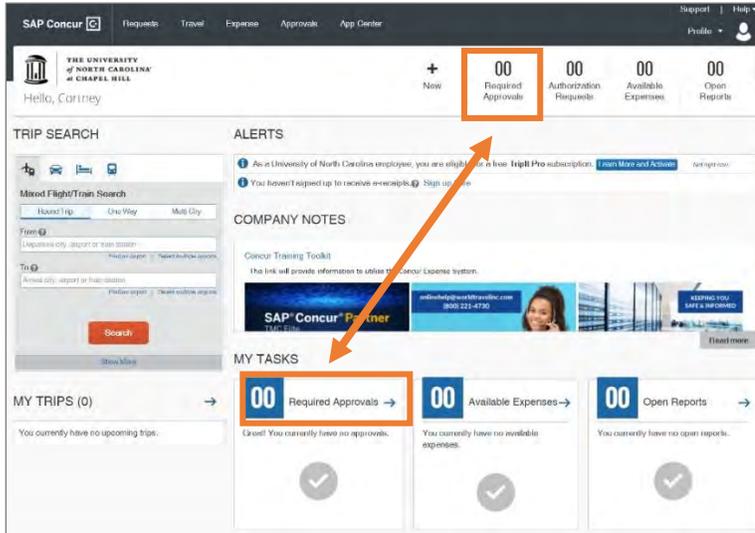


**Result:** The report is submitted, and the status is listed in the Active Reports list.

# Approving Expense Reports

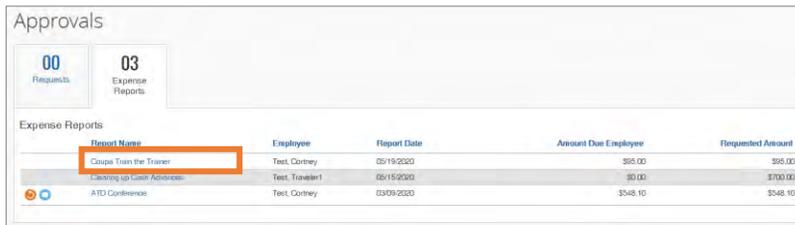
Follow these steps to approve an expense report:

1. Click the **Required Approvals** tile or tab.



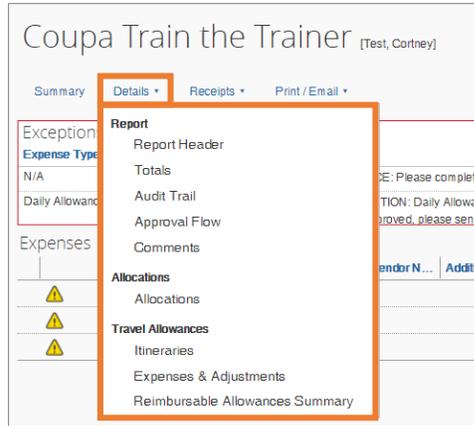
**Result:** The Approvals page will appear.

2. Click on the Report Name that you want to review for approval.

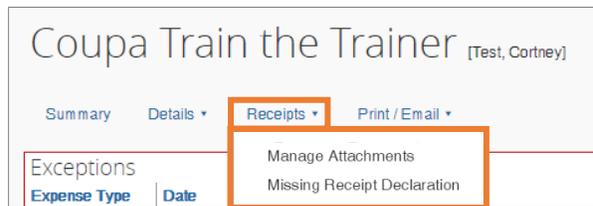


**Result:** The Summary expense report will appear.

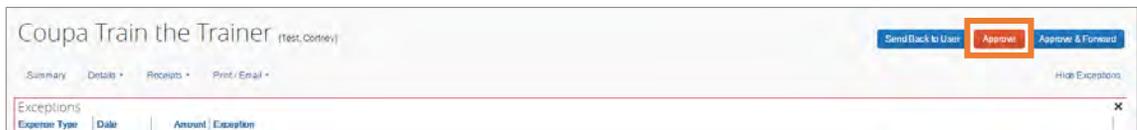
3. Click on the following to review the expense:
  - a. **Details** – This link dropdown option will display various elements of the expenses included in the report.



- b. **Receipts** – This link dropdown option will allow you to review attached receipts and add receipts if necessary.



- 4. Click the **Approve** button, to certify that you have reviewed the report and it is in compliance with University policies.



**Result:** A Final Confirmation pop-up window will appear.

- 5. Click the **Accept** button.



**Result:** The Expense Report is approved and will no longer be shown on your list of Pending Reports.

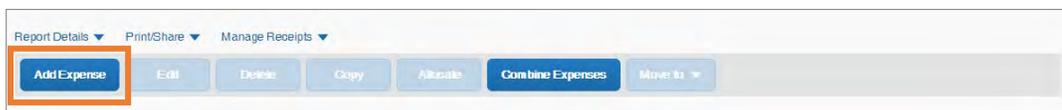
# 14. Itemizing Expenses and Attendees

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

## Itemizing Nightly Lodging Expenses

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

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



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

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

The screenshot shows the 'Add Expense' dialog box. At the top, there are two buttons: '0 Available Expenses' and '+ Create New Expense'. Below these is a search bar labeled 'Search for an expense type'. A list of expense types is displayed, with '01. Lodging Expenses' expanded. Under this category, 'Hotel' is highlighted with an orange box. Other categories include 'Conference/Seminar Fees', '02. Transportation', and 'Fuel/Charging Stations'.

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

The screenshot shows the 'New Expense' form. The 'Details' tab is active. The 'Expense Type' field is set to 'HOTEL'. The 'Check-in Date', 'Check-out Date', 'Transaction Date', 'Trip Type', 'Report/Trip Purpose', 'Vendor', 'City of Purchase', 'Amount', and 'Currency' fields are highlighted with an orange box. The 'Attach Receipt Image' button is also highlighted with an orange box. The form includes various required fields marked with red asterisks and optional fields.

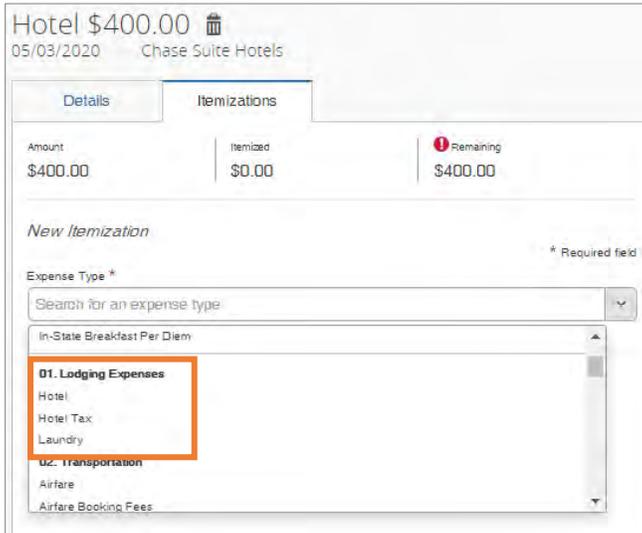
6. Click the **Itemization** tab.

The screenshot shows the 'New Expense' form with the 'Itemization' tab selected. The 'Expense Type' field is set to 'HOTEL'. The 'Check-in Date', 'Check-out Date', 'Transaction Date', 'Trip Type', 'Report/Trip Purpose', 'Vendor', 'City of Purchase', 'Amount', and 'Currency' fields are highlighted with an orange box. The 'Attach Receipt Image' button is also highlighted with an orange box.

7. Click the **Create Itemization** button.

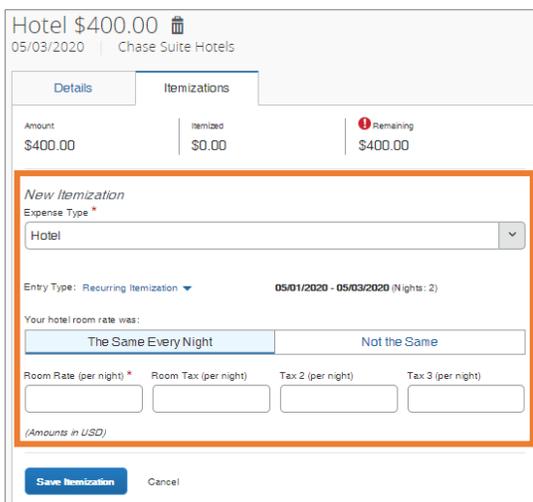


8. Select the Hotel expense type from the Lodging Expenses listing.



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

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



10. Click the **Save Itemization** button.

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

## Itemizing Business Meal Expenses

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

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

The screenshot shows the 'New Expense' form with the 'Details' tab selected. The form includes the following fields and options:

- Expense Type \***: A dropdown menu with 'Food & Beverage 8 or less' selected. This field is highlighted with an orange box.
- Transaction Date \***: A date input field with a calendar icon.
- Traveler Type \***: A dropdown menu with 'Faculty/Staff' selected.
- Trip Type \***: A dropdown menu with 'Out-of-State' selected.
- Report/Trip Purpose \***: A dropdown menu with 'Conference' selected.
- Additional Information**: A text input field.
- Enter Vendor Name**: A text input field.
- City of Purchase**: A dropdown menu.
- Payment Type \***: A dropdown menu with '\*PLEASE SELECT PAYMENT TYPE' selected.
- 3rd Party Reimbursement Paid to?**: A dropdown menu.
- Amount \***: A text input field.
- Currency \***: A dropdown menu with 'US, Dollar' selected.
- Personal Expense (do not reimburse)
- Comment**: A text area.

At the bottom of the form are buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'. On the right side, there is a large area with a red border and a red plus sign, labeled 'Attach Receipt Image'. At the top right of the form are buttons for 'Cancel' and 'Save Expense', and a 'Hide Receipt' link.

4. Click the **Itemizations** tab.

The screenshot shows the 'New Expense' form with the 'Itemizations' tab selected. The 'Itemizations' tab is highlighted with an orange box. The form displays the same fields as the previous screenshot, but the 'Expense Type' field is now 'Food & Beverage 8 or less' and the 'Transaction Date' is 'MM/DD/YYYY'. The 'Itemizations' tab is highlighted with an orange box.

5. Complete all of the necessary fields for this expense.

Amount	Itemized	Remaining
\$300.00	\$0.00	\$300.00

**UNC-Meetings & Amenities** \* Required field

Food & Non-Alcoholic Beverages  Personal Expense (do not reimburse)

Alcoholic Beverages  Personal Expense (do not reimburse)

Tips/Gratuities  Personal Expense (do not reimburse)

Tax  Personal Expense (do not reimburse)

Non Reimbursable/Personal Expense  Personal Expense (do not reimburse)

(Amounts in USD)

Attach Receipt Image

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

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

## Adding Attendees to a Business Meal Expense

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

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

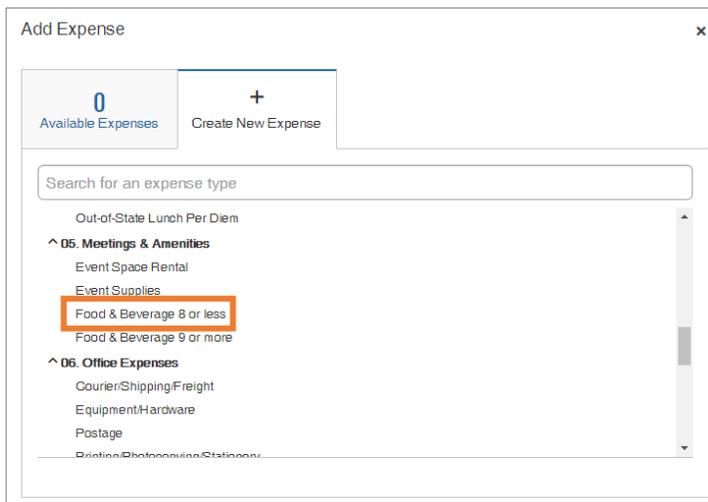
## Adding Attendees to a Business Meal with 8 or less

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

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



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



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

The screenshot shows the 'New Expense' form with the 'Details' tab selected. A red box highlights the following fields: Expense Type (set to 'Food & Beverage 8 or less'), Transaction Date (MM/DD/YYYY), Traveler Type (Faculty/Staff), Trip Type (Out-of-State), Report/Trip Purpose (Conference), Payment Type (PLEASE SELECT PAYMENT TYPE), and Amount (with a currency dropdown set to US, Dollar). A red asterisk indicates that these fields are required. To the right of the form is a large red-bordered area with a red plus sign and the text 'Attach Receipt Image'. At the bottom of the form are buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'.

6. Click the **Attendees** link.

This screenshot shows the 'New Expense' form with the 'Attendees (1)' link highlighted by a red box. The form is partially filled out, showing the Expense Type as 'Food & Beverage 8 or less', Transaction Date as MM/DD/YYYY, and Traveler Type as Faculty/Staff. The 'Attendees (1)' link is located at the top left of the form, next to an 'Allocate' button.

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

7. Click the **Add** button.

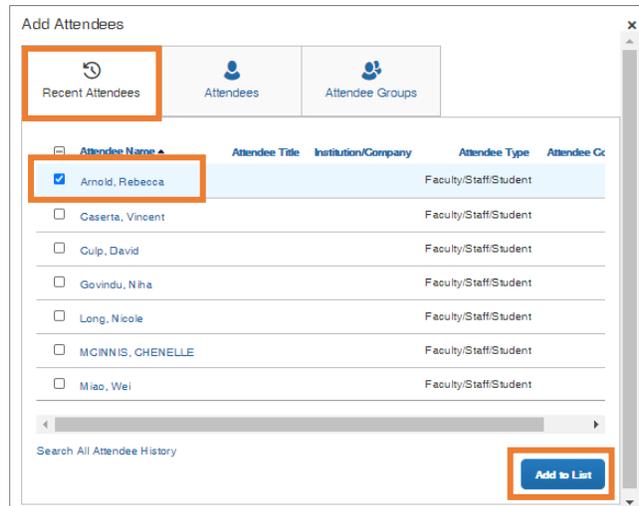
The screenshot shows the 'Attendees' page for the expense. At the top, it displays 'Attendees', 'Food & Beverage 8 or less', and '\$300.00'. Below this is a table with columns for 'Attendee Name', 'Attendee Title', 'Attendee Type', 'Attendee Count', and 'Amount'. One attendee is listed: 'Tara Conroy', 'Faculty/Staff/Student', '1', and '\$300.00'. A red box highlights the 'Add' button in the top left corner of the table area.

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

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

**Recent Attendees Tab** - This tab displays recently used attendees.

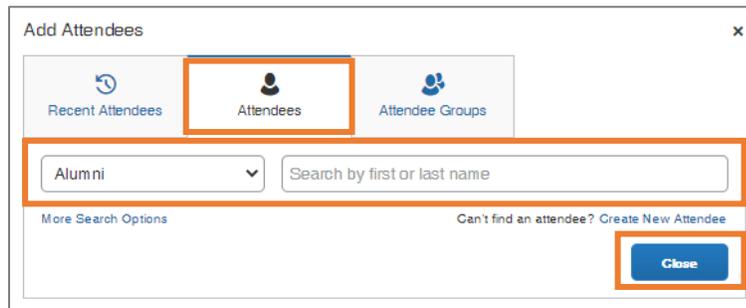
- a. Mark the Checkbox beside the attendees of the business meal.
- b. Click the **Add to List** button.



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

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

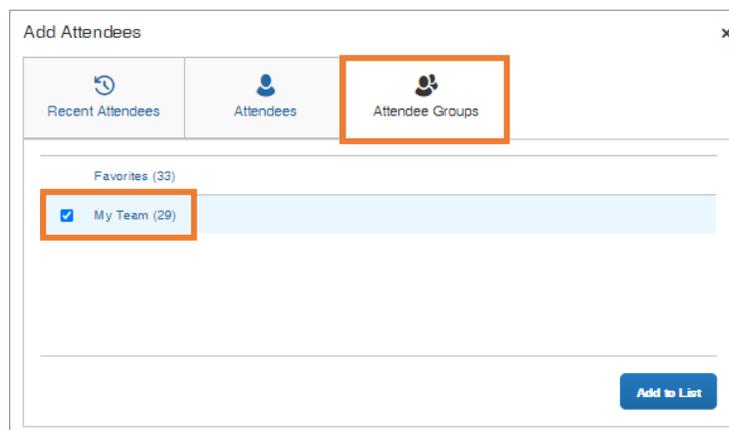
- a. Search for, then click on the attendee.
- b. Click the **Close** button.



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

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

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



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

9. Click the **Save** button.

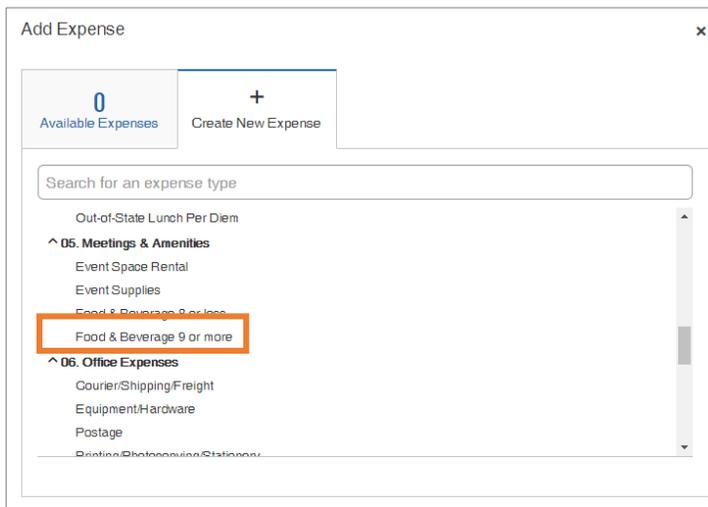
## Adding Attendees to a Business Meal with 9 or More

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

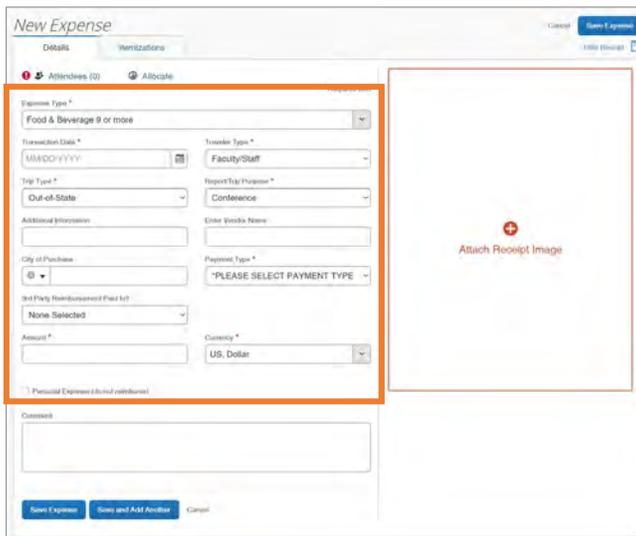
1. Open a current Expense Report or Create a New Report.
2. Click the **Add Expense** button.



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



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



6. Click the **Attendees** link.

The screenshot shows the 'New Expense' form with two tabs: 'Details' and 'Itemizations'. Below the tabs, there is a link for 'Attendees (0)' with a red exclamation mark icon, which is highlighted with an orange box. To the right of this link is an 'Allocate' button. Below these elements, there are fields for 'Expense Type \*' (set to 'Food & Beverage 9 or more'), 'Transaction Date \*', and 'Traveler Type \*'. A '\* Required field' label is visible on the right side.

7. Click the **Add** button.

The screenshot shows the 'Attendees' section of the form. It displays 'Attendees: 0' and a total amount of '\$600.00'. Below this, there is a row of buttons: 'Add' (highlighted with an orange box), 'Refresh', 'Delete Group', and 'Copy from Expense'.

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

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

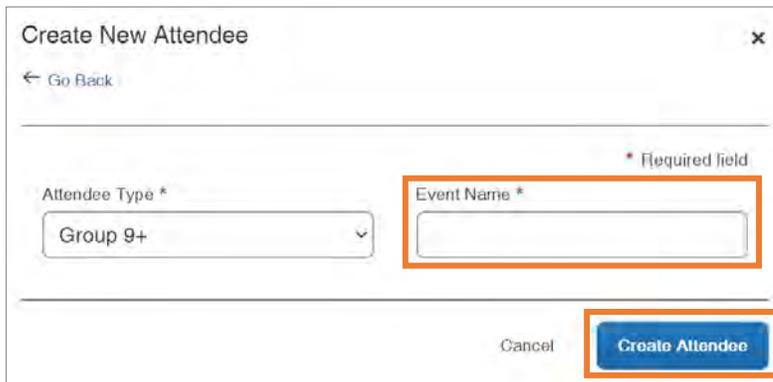
The screenshot shows the 'Add Attendees' pop-up window. It has four tabs: 'Recent Attendees', 'Attendees' (highlighted with an orange box), 'Attendee Groups', and 'Import Attendees'. Below the tabs, there is a dropdown for 'Attendee Type' set to 'Group 9+'. To the right is a search field for 'Attendee Name' with the placeholder text 'Search by first or last name'. Below the search field, there is a link for 'Create New Attendee' (highlighted with an orange box) and a 'Close' button.

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

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

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

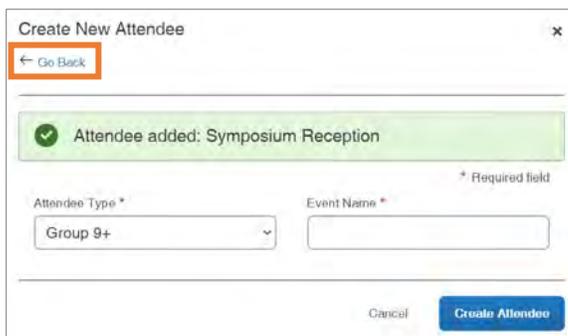
11. Click the **Create Attendee** button.



The screenshot shows a 'Create New Attendee' window. At the top left is a 'Go Back' link with a left arrow. Below it are two input fields: 'Attendee Type \*' with a dropdown menu showing 'Group 9+' and 'Event Name \*' with an empty text box. A red asterisk and the text '\* Required field' are positioned to the right of the 'Event Name' field. At the bottom right, there are two buttons: 'Cancel' and 'Create Attendee'. The 'Event Name' field and the 'Create Attendee' button are highlighted with orange rectangular boxes.

**Result:** The attendee group has been created.

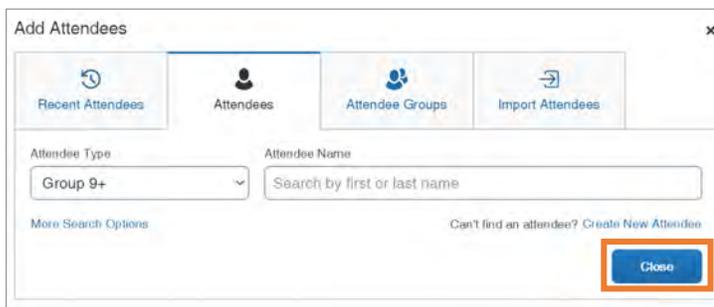
12. Click the **Go Back** link.



The screenshot shows the same 'Create New Attendee' window. A green success message banner is displayed at the top, containing a green checkmark icon and the text 'Attendee added: Symposium Reception'. The 'Go Back' link at the top left is now highlighted with an orange rectangular box. The form fields and buttons below remain the same as in the previous screenshot.

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

13. Click the **Close** button.



The screenshot shows an 'Add Attendees' window. At the top, there are four tabs: 'Recent Attendees', 'Attendees', 'Attendee Groups', and 'Import Attendees'. Below the tabs are two input fields: 'Attendee Type' with a dropdown menu showing 'Group 9+' and 'Attendee Name' with a text box containing the placeholder 'Search by first or last name'. Below these fields are links for 'More Search Options' and 'Can't find an attendee? Create New Attendee'. At the bottom right, there is a 'Close' button highlighted with an orange rectangular box.

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

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

Attendees

Food & Beverage 9 or more \$600.00

Attendees: 50

**Add** | Decrease | Create Group | Copy & Paste | Refresh

<input type="checkbox"/>	Attendee Name ▲	Attendee Title	Institution/Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Symposium Reception			Group 9+	50	\$600.00

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

**Result:** Your attendees have been added to the expense.

## Creating Attendee Groups

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

Follow these steps to create a group:

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

**Add** | **Decrease** | **Create Group** | Copy & Paste | Refresh

<input type="checkbox"/>	Attendee Name ▲	Attendee Title	Institution/Company	Attendee Type	Attendee Count	Amount
<input checked="" type="checkbox"/>	Arnold, Rebecca			Faculty/Staff/Student	1	\$50.00
<input checked="" type="checkbox"/>	Caserio, Vincent			Faculty/Staff/Student	1	\$50.00
<input type="checkbox"/>	Govindu, Nitha			Faculty/Staff/Student	1	\$50.00
<input type="checkbox"/>	Miao, Wei			Faculty/Staff/Student	1	\$50.00
<input type="checkbox"/>	Taylor, Shannon			Faculty/Staff/Student	1	\$50.00
<input type="checkbox"/>	Test, Anta			Faculty/Staff/Student	1	\$50.00

**Result:** A Create Group popup window will appear.

4. Enter a name for the Group Name.

5. Click the **Save** button.



Create Group x

Group Name \*

CISDE Team

Cancel Save

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