Common Concur Questions/Errors

REQUEST/BOOKING

1. **When is a Request required or not required to be completed for a reimbursement?**

Requests do not need to be submitted for non-overnight trips (unless there is a booking in Concur) or non-travel reimbursements (business meal, virtual conf registration, membership, etc.). A request should always be done prior to an overnight trip or if you will need to book anything in Concur.

2. **What should I put for the Request or Report name on the header?**

We do not have a requirement as to what you need to specifically include, though we suggest to check with your department to see if they have a required naming convention. The best practice we suggest is to pick something meaningful to you that you will easily recognize and the approvers will understand. In the future this will help you and approvers easily identify past requests.

3. **There are some expenses on the segments tab and some on the expenses tab- which ones should I use?**

The segments tab should only include expenses you are wanting to book within Concur, if any. If you are not wanting to book in Concur all expenses should be on the Expenses tab. For airfare you can choose 'airline fees' and 'ground transportation' for rental car. Please make sure to leave a comment on the expense so it is clear to the approvers why you chose to do that.

4. **What changes can be made to an approved Request or a Request already submitted for approval?**

In order to make any changes the Request has to be 'recalled', changes made, then resubmitted. Once it is approved no modifications can be made. For more information on the different statuses check this out- https://finance.untsystem.edu/sites/default/files/concur-payment-approval-status.pdf

5. **If we include attachments on the Request will they carry over to the Expense Report?**

Attachments do not carry over to the expense report so they will need to be duplicated or you can just include with the expense report. Conference agendas should be attached to the expense reports not requests.

6. **How do I got about requesting a cash advance?**

The Cash Advance field of the Request is not available to everyone at the moment. If you would like to request access to the cash advance field please fill out the webform here: https://finance.untsystem.edu/cash-advance-setup-concur.

7. **I seem to have more than one approved Requests for the same trip- how did this happen and what should I do?**

If you did not start the booking from the approved request (via the 'Book with Concur Travel' button on the segments tab), OR if you start to book and leave the booking process or put a flight on hold, it might generate a new request. Once the booking process is started it should be completed in one sitting. If you need to leave the booking process you will need to start over from the approved request. If one of the requests is for a booking and the other is for the other expenses you do not have to delete one- you can link more than one request to an expense report. Or if not, you can always 'close/inactivate' once the trip has taken place to remove it from being active and disencumber the funds.

8. **I accidently deleted or closed/inactivated my approved request- is there any way I can get that back?**

Unfortunately, there is not a way to recover or reactivate an inactivated or deleted Request. If it is still prior to the trip you can create another one or if it has already passed then on your expense report please make a comment that your Request was accidentally deleted.

9. **What if the request with estimated expenses is more or less than the actuals expenses submitting in the expense report?**

Similar to previous process, the request is just an estimate of the expenses for the trip so there is no action necessary when actuals expenses amount differ from the estimated expenses in the request. Keep in mind though the request does encumber the funds in which the expense report reconciles.

10. **When I booked travel it generated a Request that had to be approved within 24 hours or it will cancel. Is there a way to avoid this?**

Yes- there is no time limit if the travel is booked from the segments tab on the approved request. Without going through the approved request the system cannot link the approvals to the booking so one is auto-created, which will only hold the booking without approvals completed for 24 hours.

EXPENSE REPORT

11. **I have multiple months of mileage and non-travel expenses I need to submit for reimbursement- can I include those on one expense report or do I need to do separate reports?**

The best practice is to create a new expense report at the beginning of each month and add non-overnight trip expenses throughout the month to submit at the end of the month. Otherwise you can include multiple months of mileage and individual expenses on one report. However if there was an overnight stay or booking associated with the trip or if the 'trip type' varies for some expenses (depending on funding type or travel location) then those expenses will need to be done on a separate expense report- especially if there is an approved Request that needs to be linked to it.

12. **When creating the Expense Report I received a pop up about travel allowance expenses, what should I select?**

Travel allowance in Concur is referring to per diem. In other words, for this expense report will you be needing to claim any meal per diem expenses?

13. **What is the purpose of the travel allowance itinerary and do I need to do one for every Expense Report?**

The system uses the itinerary stop locations to determine the correct per diem rate. The itinerary should match your trip itinerary so anytime you leave one location an itinerary line should be added. You will need to do one anytime you are reimbursing per diem meals or if you are being reimbursed from a grant fund that will need to be checked against rates.

14. **I am trying to create a new travel itinerary for the travel allowances and some of the dates I need are greyed out- how do I resolve?**

This usually means you already created an itinerary with those dates that needs to be either assigned to the report or deleted to create a new one. If it is assigned and incorrect you can edit it under 'assigned itineraries'. To delete and create a new one first you have to 'unassign' it under 'assigned itineraries' near the top then delete it from the below section. After that you should be able to create a new one using those dates.

15. **I have some expenses listed under Available Expenses in Concur, how do I go about adding those to my report?**

Select the expenses you would like to move to a report and click the blue 'Move' action button. You have the option to move it to a new report or add it to one already created.

16. **When do I need to allocate expenses?**

You only need to allocate expenses when you want to split an expense or expenses (by percentage or amount) between the account on the Report Header and other accounts. If you need to allocate multiple expenses please select 'Allocations' under 'Details'. Otherwise the chartstring on the Report Header is the account to be charged so please double check it is correct.

17. **There is an exception in yellow asking to contact Supplier Management, how do I take care of that?**

This usually means that you either have not received reimbursement before and need to be added as a vendor in the system or you do have a file but it is missing information. Please provide in the email to Supplier.Management@untsystem.edu your full name, Employee ID, and current mailing address so they can easily locate you and make sure they have the correct information. The exception will stay with the report even after you email them so if you would please include the email or a comment that you reached out so the approvers are aware it was taken care of.

18. **Some of my receipts have personal expenses included, how do I make sure those are not included in my reimbursement?**

When you itemize the receipt there is a check box for a personal expense or a separate personal expense box to include it in. Either way the system subtracts the personal expense amount from the total reimbursement for you. There is also a Personal/Non-Reimbursable expense type in the system that is not counted in the reimbursement total.

19. **When would an expense report have to be resubmitted through the approval process?**

Similar to the request once an expense report is submitted for approval no changes can be made along the process, except to attach receipts. So if an approver notices something that is incorrect the expense report will have to be sent back for correction and resubmitted for approval. Or if you have the option you can 'recall' it to make changes and resubmit. Best practice is to double check all amounts, receipts, etc. *before* submittal to limit the number of times it has to go through the approval process.

20. How do I view past expense reports?

From the homepage click on the Expenses tab and look on the right side for 'Report Library' on the Manage Expenses tab. Click on the blue 'View' action button to and select "All Reports" to view all or select a different option.

DELEGATES/ASSISTANTS

21. What is the difference between a Delegate and Travel assistant?

A travel assistant can book travel in Concur on your behalf and delegates can create requests and expense reports for you or for approvers they can preview or temporarily approve while you are out of office. If you need someone to do both on your behalf you will need to set them up in both places in your profile. Please see below question and https://www.untsystem.edu/CONCURTRAVEL.

22. I am already able to book travel for my boss but there is no Request or Expense tab in Concur- how can I create a request or expense for them?

The employee will need to add you as a delegate in their Profile (top right corner- profile settings – request/report delegates). Reports and requests share delegates so you do not need to add them twice. Delegates have a separate setup than travel assistant/arrangers and you can also view who you are delegate for as well. Once they add you make sure you switch over to their profile so you are acting as them then the tabs should be visible at the top. Please note- delegates can create request/reports for another but only the employee can submit for approval. When the report is ready for the employee to submit select the orange 'Notify Employee' button and the system will notify the employee so they can look it over and submit.

23. As an approver what permissions are available for me to assign to a delegate?

You can assign a delegate to preview requests/reports sent to you for approval to ensure everything is ready before it gets to you. When you go to setup your delegates make sure to check 'can preview for approver' box. After they look it over and select 'notify employee' the system will notify you it is ready for approval. If you are wanting to have someone to approve for you temporarily there is a selection for that. The person must already be an approver in the system to be assigned to approve for you.

24. I am an approver trying to setup someone as a delegate for me and some approver options are not showing. How do I fix?

The person you are trying to setup to approve for you might not be setup as an approver in the system already. An approver is anyone who is a supervisor, manages an account fund, or does both. Only authorized users can be approver delegates.

25. What is the difference between travel assistant and primary travel assistant?

While both can book travel on behalf of another, the primary travel assistant gets the added benefit of receiving an emailed travel itinerary for every travel booking in Concur, no matter who books the trip. This would be ideal for someone who always oversees another's schedule or travel reservations but might not always book for them. Assigning a primary assistant is optional and only one can be assigned per employee.

GENERAL

26. What are the benefits of the mobile applications?

The Concur mobile app with ExpenseIt makes it very easy to capture receipt images and upload/attach to your expense report while traveling so you do not have to carry around a bunch of receipts. You can also manage approvals and expenses for both requests and expense reports, though we recommend using the desktop module for anything in depth. The biggest benefit of using the Concur app is that your reimbursement can be processed even faster, even while you are out of the office. While traveling a delegate can prepare the report for you with the receipts uploaded so it is ready to submit when you return. TripIt app is also recommended as it organizes all your travel itineraries and reservations in one place for you, perfect for busy travelers. You can connect these apps to Concur in the App Center at the top of the Concur homepage. We have a self-paced training just for the mobile app- check it out here: https://www.untsystem.edu/travel-training.

27. Where can I find Concur travel trainings?

We have all our trainings listed here: https://finance.untsystem.edu/travel-training. We have self-paced and live trainings via Zoom to choose from. Once completed, the self-paced trainings can be revisited if you need a refresher so it is a really good resource.

COMMON ERRORS

- Account code lookup error -change the trip type on report header if there was an overnight stay
- Itinerary line error- If no overnight stay there is no need to create a travel itinerary. If one was created it will need to be deleted. If there was an overnight stay then another line will need to be added. For more information: https://www.untsystem.edu/CONCURTRAVEL
- Hotel travel allowance box -defaults to checked, need to be uncheck if on local funds to remove the error
- All meals/transportation must be itemized- if you do not see an Save button then the next step is to itemized then you can save it. If there is nothing to put for a required field please put in ‘0’.
- Tips/gratuities on all expenses should be split out (they sometimes hide so be on the lookout)
- Choosing the correct meal expense type (a lot of different options which can be confusing):
  -Breakfast/lunch/dinner - individual meal associated with an overnight trip.
  -Business meal- meeting with UNT guests to discuss business, not usually associated with a trip.
  -Group Meals- usually a meal with a UNT group, usually students or club, not necessarily to discuss business or associated with a trip.
  -Meal w/ no overnight stay- single day personal/individual travel meal with no overnight stay (taxable).
- Memberships have their own separate expense type and should not be grouped with registration. Sometimes registration receipts include a charge for membership- please separate out.

DID YOU KNOW/HELPFUL TIPS

- In Concur the Receipt Affidavit form is built into the system making it easy if you have a lost receipt. After the expense is added to the expense report under Receipts select 'Missing receipt affidavit' select the expense and select 'accept & create'. The Affidavit will automatically be uploaded as a receipt image. You will still have to itemize any tips or alcohol- if you are not sure you can put in 0. If it was paid with a credit card then we can accept a copy of the redacted card statement in lieu of the receipt.
- When in doubt leave a comment – tell the story so everything is clear
- Some exceptions in yellow stay visible on the request/expense report even after they are completed. Please leave a comment to explain once it is completed and then you can disregard it. If you are not sure how to resolve please reach out to us.
- Did you know you can email receipts straight into Concur? First you will need to make sure you have verified your email in your profile (under 'Email address' section). If you are a delegate you should verify in your profile as well as the employee. Once verified you can forward email receipts to receipts@concur.com and the system will auto-add it to your 'Available Receipts' located on the Expense tab. Now when the expense report is being created and you go to attach receipts it will show up as an available receipt to attach for the expense. For more information there are a couple of questions right above where you verify your email in your profile that might help.
- If you have a repeating mileage you can 'copy' the expense on your report so you do not need to add it multiple times. Select the expense on the left side checkbox and select the blue 'Copy' button. Then you can edit the details that were copied over.
- If you have a recurring trip you can also 'copy' the entire request or report and make a duplicate of it for you to edit. If you select the check box to the left of the request or report the blue 'copy' action button should show after you click on that a box will come up so you can change the name and date on the new one.