

Concur

Travel Requests and Expenses

DEPARTMENT OF
***Romance
Studies***



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

What is Concur?

Concur is the University of North Carolina at Chapel Hill's software program for pre-travel approval, travel booking and travel and business entertainment expense reimbursements. In addition, purchases made on the University Travel & Expense (T&E) Card will be reconciled in Concur via an Expense report.

All faculty and staff began using Concur for travel on April 27, 2021.



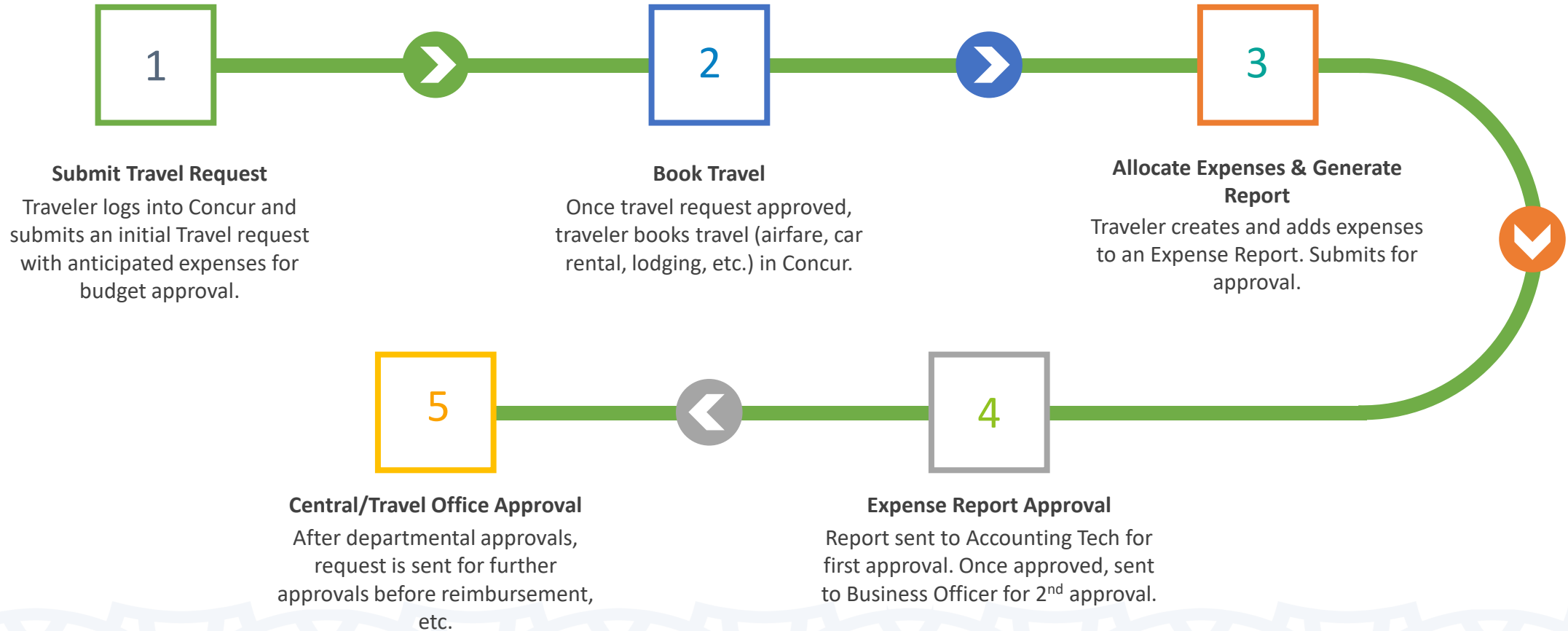
Objectives

- Review Concur Workflows
- Travel Request and Expense Report Tips and Tricks
- Concur Resources



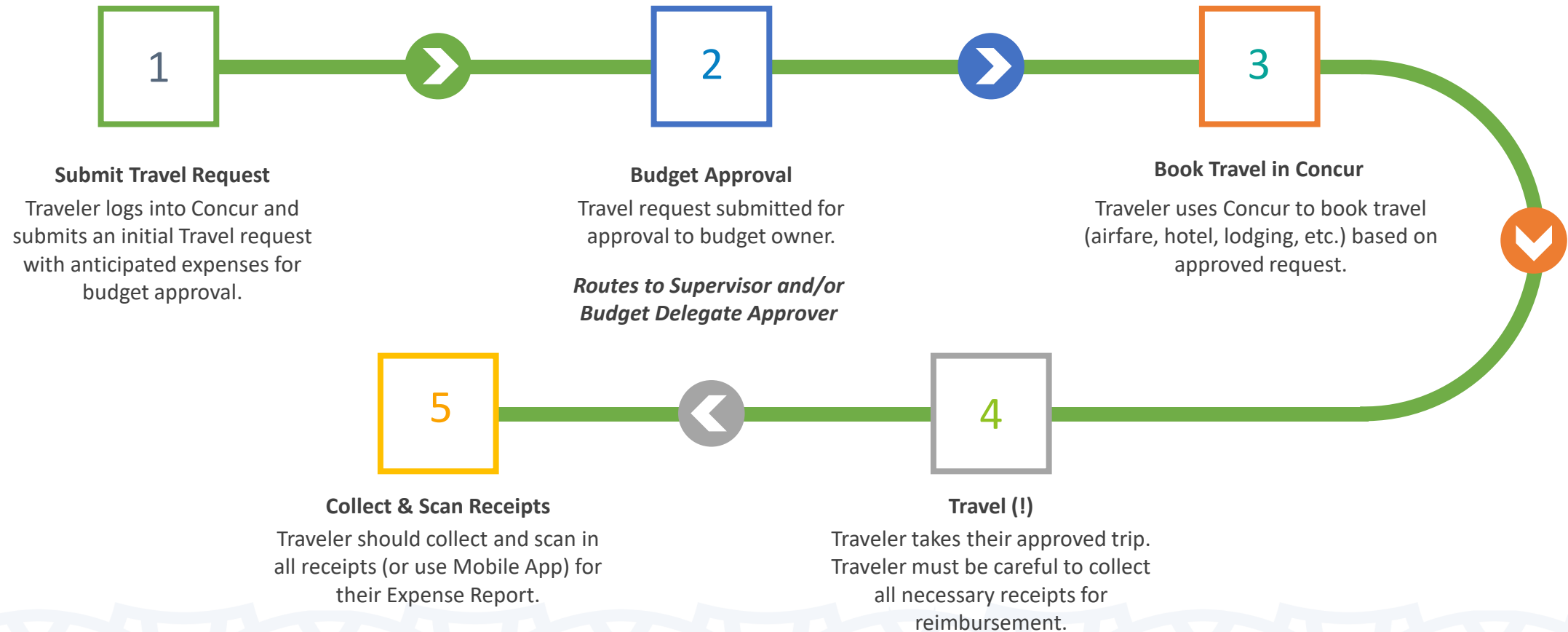
Concur Approval Workflow

Macro view of workflow.



Concur Request Workflow

Request workflow & approvals.



Concur Request Tips and Tricks

College of Arts and Sciences Travel

- If travel requires airfare, per diem and/or overnight lodging
 - Submit a Travel Request in Concur with the request naming convention “300100-Your Last Name- Conference Name/Acronym” .
- For virtual conferences
 - Submit a CAS Travel request at <https://romsnet.web.unc.edu/financial-matters/funding-requests/cas-travel/>

International Travel

1. Download and complete the International Travel Approval form: (Return to department chair)
2. Obtain the Designated Approver Signature on the International Travel Approval form
Designated approvers include Deans, Department Chairs, Division Chiefs, Center and Area Directors
3. Upload the approved International Travel Approval form in Concur to corresponding Travel Request.

Source: <https://global.unc.edu/travel-policies/>

Book Travel

Airfare

- Airfare should be booked online via Concur Travel, or directly through the University’s Authorized Travel Agency, World Travel, Inc.
- Booking outside of Concur Travel/World Travel Inc. is only permissible under the following circumstances:
 1. **The fare is not available for purchase through the University travel program.**
 - Limitations may be related to international in-country travel, remote travel, etc.
 2. **Significant cost savings are demonstrated to the University.** For an airfare purchase to demonstrate significant cost savings, ALL of the following requirements must be met:
 - Obtain a cost comparison from Concur/WTI/Anthony **dated on or prior to** the date of the airfare purchase. Comparison quote must be for **exact itinerary - same travel dates, times, routes, airline(s), and class of service** as the planned purchase.
 - When compared to the quote from Concur/WTI/Anthony, the cost of the airfare must be at least:
 - \$25 less for **domestic** flights
 - \$100 less for **international** flights.
 - Cost comparison and justification applies to the cost of the airline ticket only. Ancillary fees such as seat assignment, baggage, agency booking fees, etc. are not considered part of the ticket purchase price.
 - Purchases must be made using a personal credit card and reimbursement can only be requested after the completion of the trip. A copy of the comparison quote must be attached to the trip expense report.
 3. **Employee has an unused ticket credit that must be re-booked directly through the airline.**

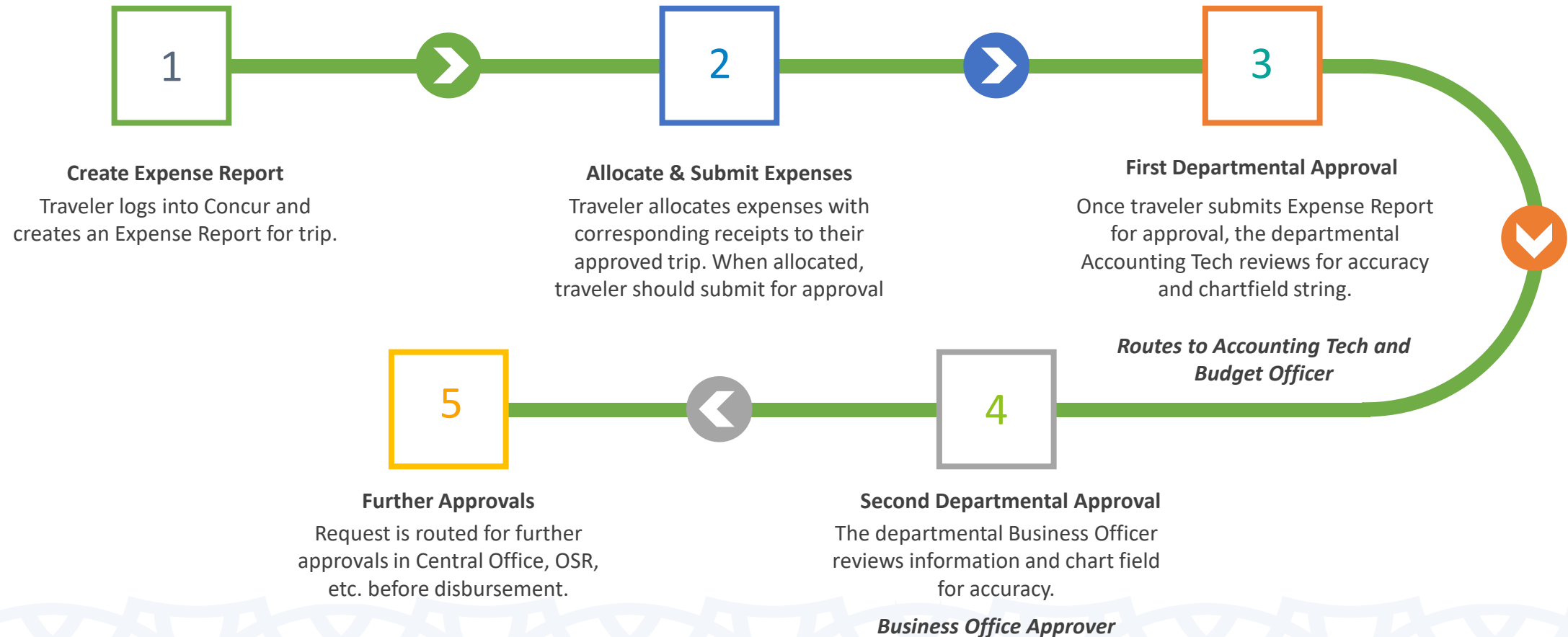
Third Party Lodging

- If planning to use third-party lodging, such as AirBnB or VRBO, the traveler must complete a [Non-Hotel Lodging Authorization Request](#) to be submitted for approval prior to travel.



Concur Expense Workflow

Expense workflow & approvals.





Concur Expense Tips and Tricks

Travel Reimbursement

- All Faculty and Staff must submit an Expense Report via Concur for travel reimbursement.
- An approved Travel Request should be linked to any Expense Reports.
- Submit expense reports* for internal departmental/unit approvals within 30 days of the last day of travel and respond promptly to requests for details and documentation.
- Itemized receipts are required for all expenses except meal per diems.
- Meal per diems are calculated at the rates set by the US General Services Administration (GSA), US Department of State, and Department of Defense, as applicable,
 - To apply meal per diems to an Expense Report select Yes for Travel Allowance when creating expense report

*There can be multiple Expense Reports for one approved Travel Request

Direct Bill Card/T&E Card

- Make sure **ALL** travel expenses booked through Concur and/or using the T&E card are reconciled within 30 days of purchase (even if the travel has not yet occurred.)

Step-by-step Guidance

[Concur User Assistant by WalkMe](#)



Concur Travel Resources

Making a Trip Booking in Concur Travel:

<https://finance.unc.edu/wp-content/uploads/sites/298/2021/04/concur-qrc-making-a-trip-booking-in-concur-travel.pdf>

Linking an Approved Travel Request to an Expense Report: <https://finance.unc.edu/wp-content/uploads/sites/298/2021/10/concur-qrc-linking-an-approved-travel-request-to-an-expense-report.pdf>

Creating a New Expense Report Quick Reference:

<https://finance.unc.edu/wp-content/uploads/sites/298/2021/03/concur-qrc-creating-a-new-expense-report.pdf>

Utilizing the Travel Allowance Wizard Quick Reference:

<https://finance.unc.edu/wp-content/uploads/sites/298/2023/02/concur-qrc-utilizing-the-travel-allowance-wizard.pdf>

