Concur UI – Webinar – April 13, 2022

Questions & Answers

Who is the audience for this webinar?

This is for anyone using Concur for creating expense reports, whether they're corporate cards or reimbursements. Business managers may also want to be aware of changes.

Will the approval aspect be brought into the UWL or will it remain only within Concur?

Concur approvals will remain in Concur.

Will the FAQs be updated for the create expense report process?

Guides, FAQ's, and other resources are being updated to reflect the new interface where relevant. Visit the Concur website at concur.duke.edu.

Will all the information that is currently in Concur remain there after the updates are made?

Yes. There will be no loss of historical information or data when the update occurs.

What about credits that don't have an actual receipt or partial refunds?

The process around receipts and what is required is not changing.

If there is a situation where the delegate does not have the receipt because the employee has it, can the delegate send for review and can the employee add the receipt before submitting?

Yes, they can do that. If employees need to add the receipt, they can do so. If this expense delegate usually does it for the employee, we want to make sure the employees knows they will be responsible for adding the receipt to the report.

Will there be a way to printout a report (spreadsheet)of total expenses for employees?

Please reach out to ET&R to discuss what type of report you are looking to view in Concur.

Does the image of a receipt still need to be a PDF?

Nothing has changed with receipt requirements. Please view the Submitting Receipts QRG on the Concur website.

What happens when you have a pending card transaction for months but another one went thru an you were able to pair it correctly?

If you could send an example for us to review that would be helpful. There could be something different about the receipt that did not pair that caused the system to not recognize and match to the corporate card charge.

Can the travel start/arrival time be changed to standard time vs. military time?

This is standard in Concur and not configurable.

On the Header, do you still have the ability to change the Cost Center codes?

Yes. Nothing has changed with this section.

Is there a way to mass upload receipts?

I am not aware of a way to mass upload a group of receipts.

Can you still allocate itemizations to different cost objects (fund codes) like in the current interface?

Yes, the allocate and itemization functionality is still available in the new user interface.

Do we follow the same "lost receipt form" upload when there is an issue getting receipts?

The electronic Missing Receipt Affidavit (now called Missing Receipt Declaration in new UI) is available in Concur and should be used when a receipt is lost or cannot be obtained from the vendor. Users should no longer use the paper missing receipt form.

Does itemization work for international transactions?

Itemization is available for certain expense types and can be used when available.

Can we add both nights together in one lodging charge?

There is no Duke requirement to itemize the lodging cost per night.

Is it still possible to use absolute values vs. percent in allocation?

Yes, you can still allocate by percentage and amount.

What if a charge needs allocation and itemization?

A charge can be allocated and itemized. Please view the How to Allocate an Expense and the How to Itemize an Expense Quick Reference Guides located on the Concur website at concur.duke.edu.

Do you have to add attendees individually if less than 4 people or can you add a group for less than 10 people?

Duke policy states that you have to provide individual names if the group is less than 10 people. You can either add attendees individually or you can create a group and make that group a favorite. You would then be able to add that favorite group, which would include the individual names, each time you created a report.

If no agenda is added, would it trigger a hard stop?

Yes, and you have to attach it and confirm it otherwise there is a hard stop.

As the employee, will the system let them know that we recalled it or do we need to let them know through email?

Employees receive an email when changes are made to their expense report. When the expense report is recalled, the action generates a change in status and the employee receives an email.

If a notification is sent to the cardholder 'ready for review' and the expense delegate notices and clicks "not ready for review', will it send the card holder a notification too?

No. Concur does not consider "not ready for review" a change in status; therefore, the employee does not receive an email.

How do you forward the report to add additional approver?

In the audit trail is where you can forward the expense report to an additional approver.

Will all cardholders be able to change approval flow when needed or will that remain limited in this new interface?

Cardholders will not be able to change their workflow approvers when submitting reports. Workflow approvers will continue to be maintained centrally by department business managers/administrators.

Just to clarify, we can have multiple travel trips in 1 travel report?

Yes, you can include receipts for multiple trips in one travel report. Information specific to each trip can be included for each expense.

What's the limit of how many transactions can be in one report?

Concur recommends limiting expense reports to less than 100 individual expenses per report. Expense reports that exceed this limit can cause problems during workflow routing as audit rules are applied to reports. Additionally, large reports may become challenging for approvers to thoroughly review. The system does not allow you to import more than 60 expenses from the Available Expenses list at a time.

Will there be additional reminders for approvals with the new interface/system? Right now, I believe they only get one.

We are working with Concur to introduce email reminders for approvers. Communication will be sent from ET&R in advance of any roll out.

When will updated quick reference guides and FAQ's be available?

Training resources are available under the Training tab on the Concur website at concur.duke.edu.

With compiling lots of charges into one report - one concern raised by a supervisor is that she thought it was odd that she could see charges that weren't going to her budget that were in the same report. I explained it was part of the new system and I couldn't change it but I was supposed to put charges in the same week together in the same report, even though they have different allocations. This is a big change for my department. What kind of messaging have you sent to approvers about reviewing charges that may or may not be their concern?

When expenses are split coded, all funding approvers receive workflow to approve charges on their cost objects. The amount each approver is responsible to approve will be noted in the report.

How often do expenses need to be reconciled and does the frequency at which you clear expenses impact the reconciliation process?

Reconciliation is based on your management center. The School of Medicine/Nursing uses FAM as its reconciliation methodology. In FAM, WBSEs must be reconciled monthly and cost centers must be reconciled at least quarterly (business units may require a more frequency reconciliation). CAMC, PAMC and the Health system require monthly reconciliation. Clearing expense reports should happen in conjunction with completing travel for a trip expense or at least on a monthly basis for non-travel expense reports. Corporate card transactions are considered untimely if they are not processed in alignment with the Untimely Posting Schedule.