

UTEP TRAVEL & EXPENSE

Concur Training

A faster, easier travel and expense experience for UTEP employees. Concur replaces the travel authorization and expense processes completed in PeopleSoft.

Athletics • Business Affairs • Research & Innovation • Science



Welcome Agenda

What we will cover in today's session

1

Why We're Moving to Concur

What campus told us and what Concur improves

2

Concur 101

Travel Request vs. Expense Report vs. Non-Travel

3

End-to-End Process

From request through reimbursement

4

Delegates & Travel Requests

Delegate access, demo, and hands-on practice

5

Approvals & Routing

Who approves, alerts, and returned documents

6

Expense Reports

Walkthrough, live demo, and hands-on practice

7

Receipts & Mobile

Capture receipts and use available expenses

8

Special Travel Scenarios

International, DC, student, and group travel

9

Resources & Support

Guides, videos, FAQs, and office hours

Why We're Moving to Concur

Before configuring Concur, we asked campus users for feedback

What campus told us

- Returned reports were the number one complaint
- Receipt challenges — missing or hard-to-attach documentation
- Too many separate forms and manual processes
- Status tracking — "where is my document?"
- Mileage complexity and travel card delays
- Expense coding confusion and international travel challenges

How Concur answers it

Easier submissions

Alerts catch missing items before you submit, not after

Fewer separate forms

Entertainment details, mileage, and currency move into Concur

Streamlined approvals

Less redundant approval and faster travel reimbursement visibility

Connected travel tools

Booking, e-receipts, mobile, and delegate support in one place

What is not changing: UTEP travel policies, approval workflows, documentation requirements, and PeopleSoft payment processing.

Concur 101: Which Form Do I Need?

The answer depends on whether you are traveling

Travel Request

- Replaces the PeopleSoft Travel Authorization.
- Used to obtain approvals and provide estimated travel expenses.

Expense Report (Travel & Non-Travel)

- Replaces the PeopleSoft Expense Report. Used to submit actual expenses, attach receipts, and request reimbursement.
- Travel expenses require a fully approved Travel Request first; non-travel expenses are created directly, with no request needed.
- Travel and non-travel expenses may be submitted together when applicable.

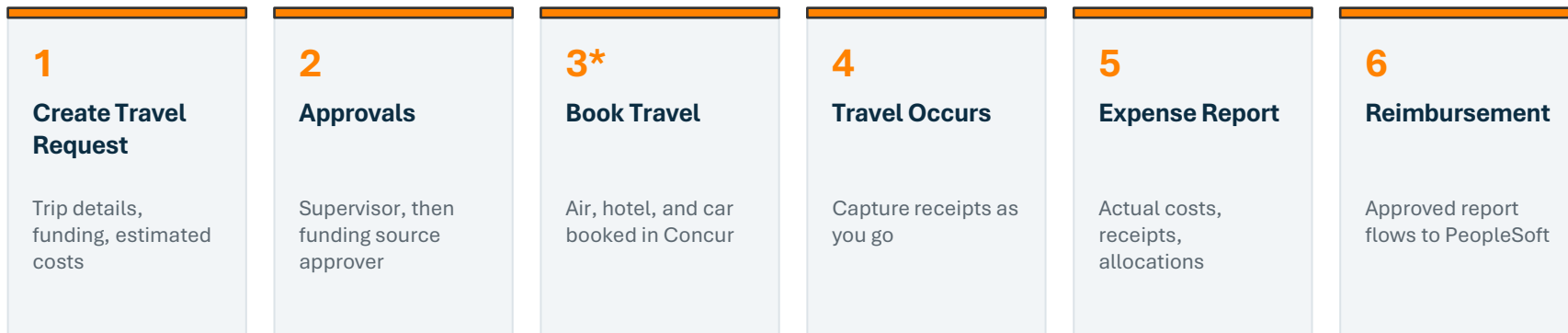
Use this form when you need to...

If you need to...	Use this form
Request approval for upcoming travel or estimate travel expenses	Travel Request
Submit expenses after a trip, or submit a non-travel business expense	Expense Report

Remember: Travel Request = before travel. Expense Report = after travel. Travel expense reports require a fully approved Travel Request.

End-to-End Travel Process Overview

From request through reimbursement, in one system



Estimates versus actuals

The Travel Request captures estimated costs so the trip can be approved in advance. The Expense Report captures the actual costs and the receipts that support them.

Approved does not mean paid

Approved reports flow to PeopleSoft automatically and then wait for the pay cycle, which still runs Monday, Wednesday, and Friday mornings. Ask for approval by close of business the day before a pay cycle day.

During the Transition Period

Which system should you use?

Use PeopleSoft

Expense Reports tied to:

PeopleSoft Travel Authorizations
approved or routing for approval

Cash Advances created and paid
through PeopleSoft

Use Concur

All new:

Travel Requests

Non-Travel Expense Reports

Cash Advance Requests

**PeopleSoft authorization or advance? Complete the related Expense Report in PeopleSoft.
Begin all new travel and expense activity in Concur.**

Concur Home Page Tour

SAP Concur

Hello, Brittany
August 17, 2026

Create Request
Start an approval request for travel or expenses.

Create Expense Report
Begin an expense report to track business related expenses.

Company Notes

Traveling International or removing campus equipment?

Please click [here](#) to complete the Export Control Certification form prior to booking your travel.

Need to remove UTEP Equipment from Campus, click [here](#).

[Concur Training Toolkit](#)

[Read More](#)

Available Expenses (2) [See All](#)

Sheraton Hotel August 17, 2026	\$1,259.00
Sheraton Hotel August 17, 2026	\$1,259.00

Expense Reports [+](#)

No Reports
When you have reports, you'll see them here.

Approvals

No Approvals
When you have approvals, you'll see them here

Requests (3) [+](#)

Testing Trip 3 August 24, 2026 Request 33KF	\$1,938.00
Testing Trip 2 August 24, 2026 Request 33KD	\$1,998.00
Testing Town August 11, 2026 Request 33K7	\$1,487.00

Everything you need lives in these areas. Learn where they are now and the rest of the process gets much easier.

Concur Home Page Tour

Quick Action Buttons - Create & Submit

Create Travel Requests and Expense Reports for travel approval and reimbursement.

Profile and Settings:

Access your profile, user settings, delegates, expense preferences, and system notifications.

Navigation Menu:

Quick access to key Concur modules, including the Home page, Travel, Expense, Approvals

The screenshot shows the SAP Concur Home Page for user Brittany. The top navigation bar includes the SAP Concur logo and a user profile icon labeled 'BR'. Below the header, there are two main action buttons: 'Create Request' (with a purple icon) and 'Create Expense Report' (with a blue icon). A red box highlights these buttons, with an arrow pointing to the 'Quick Action Buttons - Create & Submit' text box. To the left, a red box highlights the navigation menu, with an arrow pointing to the 'Navigation Menu:' text box. Below the action buttons, there is a 'Company Notes' section with a message about traveling internationally. At the bottom, there are four main tiles: 'Available Expenses (2)', 'Expense Reports', 'Approvals', and 'Requests (3)'. A red box highlights these tiles, with an arrow pointing to the 'Expense & Request Management:' text box. The 'Available Expenses' tile shows two entries for 'Sheraton Hotel' on August 17, 2026, each for \$1,259.00. The 'Expense Reports' and 'Approvals' tiles both show 'No Reports' and 'No Approvals' respectively, with a magnifying glass icon and a question mark. The 'Requests' tile shows three entries: 'Testing Trip 3' for \$1,938.00, 'Testing Trip 2' for \$1,998.00, and 'Testing Town' for \$1,487.00.

Hello, Brittany
August 17, 2026

Create Request
Start an approval request for travel or expenses.

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Begin an expense report to track business related expenses.

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[Create Training Toolkit](#)

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Sheraton Hotel	\$1,259.00
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Expense Reports +

No Reports
When you have reports, you'll see them here.

Approvals

No Approvals
When you have approvals, you'll see them here.

Requests (3) +

Testing Trip 3	\$1,938.00
August 24, 2026	
Request 33KF	
Testing Trip 2	\$1,998.00
August 24, 2026	
Request 33KD	
Testing Town	\$1,487.00
August 11, 2026	
Request 33K7	

Expense & Request Management:

View and manage your available expenses, expense reports, approvals, and travel requests all in one place.

Use these tiles to track report and request statuses, review items awaiting approval, and access expenses available for reimbursement.

Delegates

Delegates

Department support for travelers

Delegate role

Authorized to prepare requests and reports, import expenses, and attach receipts in a traveler's Concur profile.

Who can use a delegate

Any employee can serve as or use a delegate. Frequent travelers and those using department support benefit most. Travelers can assign multiple delegates.

Travelers must submit

Delegates prepare documents and select Notify. The traveler logs in and submits.

Common use cases

Early preparation

Start reports with e-receipts before travelers return.

Staff & faculty support

Department staff manage travel paperwork.

Coverage

A backup delegate covers absences.

Student travel

Delegates process reimbursements through temporary profiles.

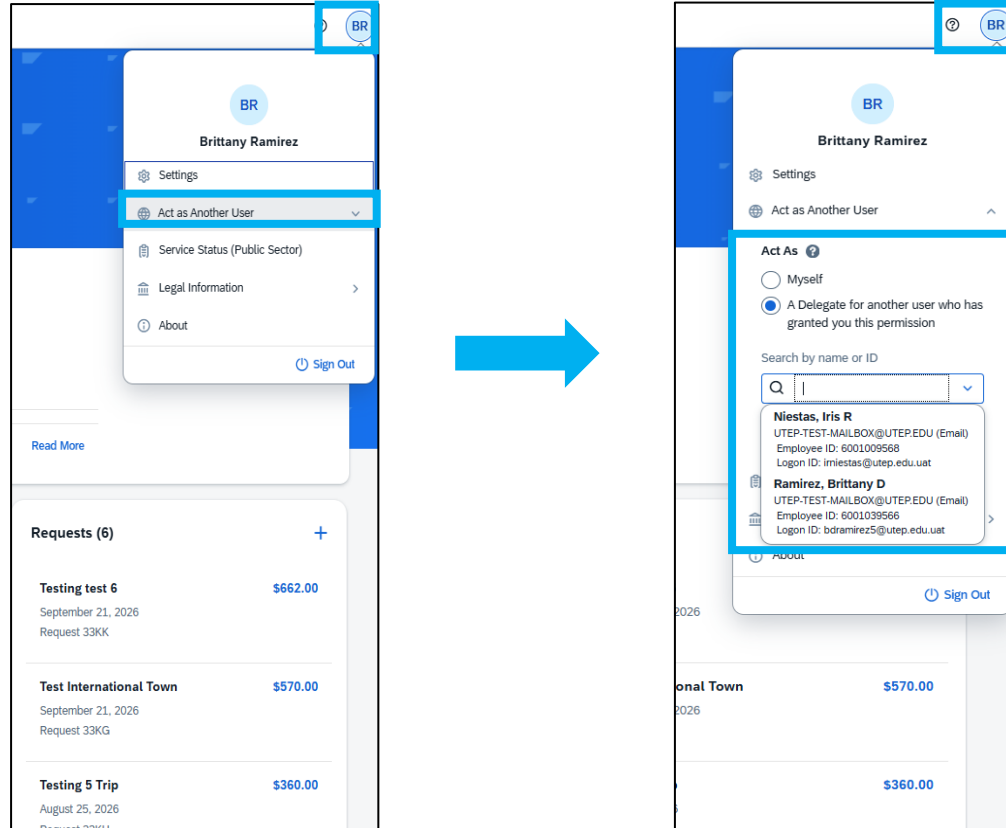
Initial delegate access matches your current PeopleSoft access.

Delegates

How departments can support their travelers

How to access your travelers:

- Click on your **profile icon**
- Select **Act as Another User**
- Under **Act As** Select **A delegate for another user who has granted you this permission**
- Select your Traveler
- Click **Switch**



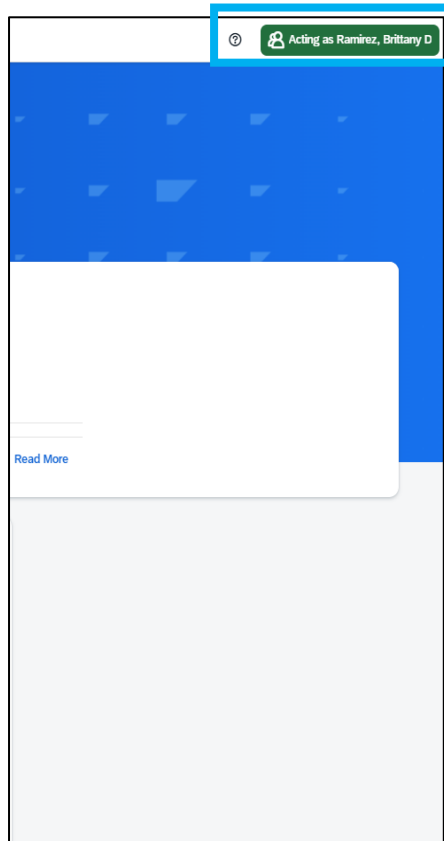
Delegates

How departments can support their travelers

Now you are acting as your Traveler!

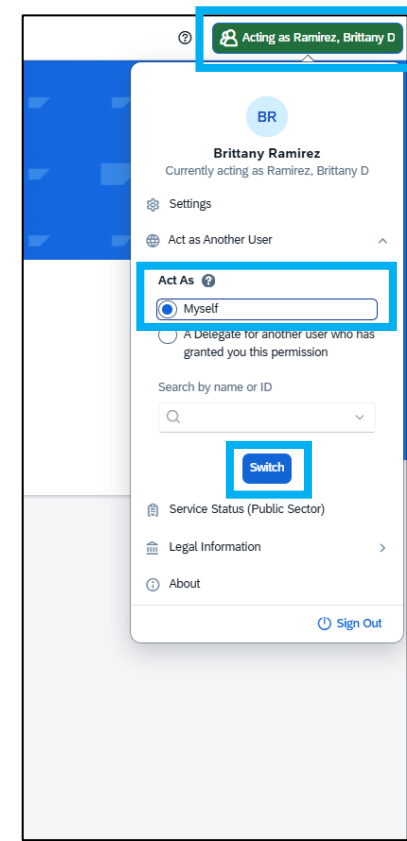
You can now create Travel Requests and Expense Reports.

Reminder: A delegate can do everything **except submit**. They prepare the document, then use Notify to email the traveler, who logs in and submits.



To return to your own profile

- Click **Acting as** [Traveler Name]
- Choose **Myself** under Act As
- Click **Switch**



Travel Requests

STEP ONE

Creating a Travel Request

Submit before you travel

STEP 1

Start the Request

On Concur Home, select Create Request.

STEP 2

Complete the Header

Enter policy, dates, purpose, departure/destination cities, and traveler/trip types.

STEP 3

Select the Policy

UTEP T&E Request Policy: most travel.
UTEP Juarez Request Policy: eligible day trips only, no overnight stay.

STEP 4

Enter Funding

Select Department, then SpeedType. Verify the auto-filled Fund Code.

STEP 5

Add Estimates

Estimate airfare, lodging, and rental car. Use Travel Allowance for meal per diem.

STEP 6

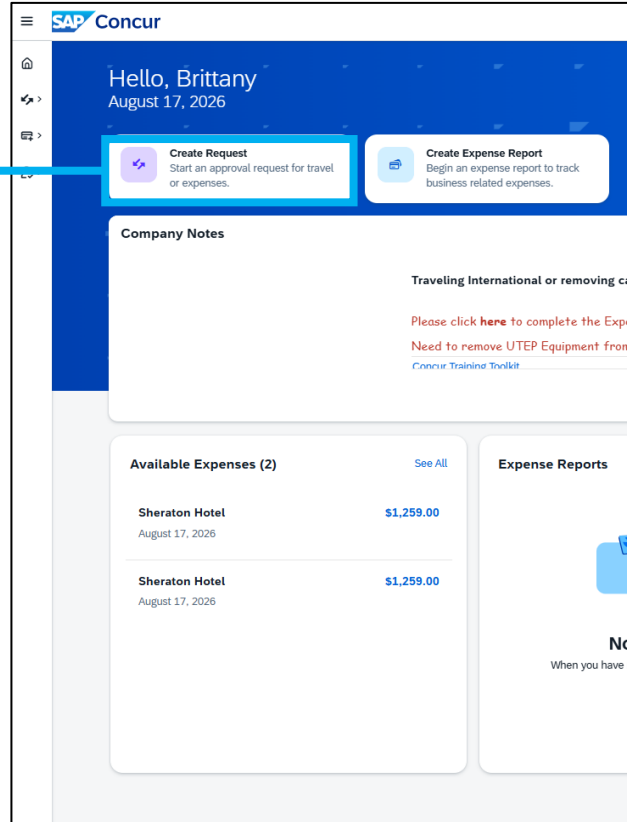
Review and Submit

Check alerts and required fields. Select Create Request, then submit.

Creating a Travel Request

The first step in the travel process — create a request

Click **Create Request** to start a Travel Request.



Creating a Travel Request

Complete the Header

Create New Request

Required field *

Request Policy *
*UTEP T&E Request policy (NIT)
*UTEP Juarez Request Policy
*UTEP T&E Request policy (NIT)

Request/ Trip Name *

Request/Trip End Date *
MM/DD/YYYY

Request/Trip Purpose *

Departure City

Destination City *

Destination Country/Region
Search by Country/Region

Traveler Type *
Employee

Trip Type *

Will this Trip contain personal travel? *

Personal Dates of travel ?

Additional Information 0/500

Business Unit *
(UTEP1) El Paso

Department *
(301100) Budget and Payroll Svcs

Speedtype *
(19021300) Budget & Payroll Svcs

Fund Code *
(3105) DES Designated Tuition

Comments To/From Approvers/Processors 0/500

Cancel Create Request

Two Request Policy options are available:

1. **UTEP Juarez Request Policy** is intended for day trips to Juarez where no overnight expenditure will be incurred. This request policy may be used for a single day trip or multiple trips over a given period within a single fiscal year.
2. **UTEP T&E Request Policy** is intended for all other travel.

Traveler Type:

1. **Employee** – select this option if an employee is traveling without students.
2. **Group** – select this option if an employee is traveling with students.

The screenshot shows the 'Create New Request' form with several fields highlighted by blue boxes and arrows pointing to explanatory text boxes:

- Request Policy ***: A dropdown menu with three options: '*UTEP T&E Request policy (NIT)', '*UTEP Juarez Request Policy', and '*UTEP T&E Request policy (NIT)'. An arrow points from this box to the first instruction box.
- Traveler Type ***: A dropdown menu with 'Employee' selected. An arrow points from this box to the 'Traveler Type' instruction box.
- Will this Trip contain personal travel? ***: A dropdown menu. An arrow points from this box to the 'Will this Trip contain personal travel?' instruction box.

Other visible fields on the form include: Request/ Trip Name *, Request/Trip End Date * (MM/DD/YYYY), Request/Trip Purpose *, Departure City, Destination City, Destination Country/Region (Search by Country/Region), Trip Type *, Additional Information (0/500), Business Unit * (UTEPI) El Paso, Fund Code * (3105) DES Designated Tuition, Department * (301100) Budget and Payroll Svcs, Speedtype * (19021300) Budget & Payroll Svcs, and Comments To/From Approvers/Processors. At the bottom right are 'Cancel' and 'Create Request' buttons.

Will this Trip contain personal travel?

1. Only select **yes** if the traveler is combining personal travel with official UTEP travel. If **yes** is selected, also complete the Personal Dates of travel field.

Funding source fields:

1. Business Unit UTEP1 is viewed only, not modified.
2. Must select **Department** before **Speedtype** (cost center or project ID).
3. **Fund Code** is auto populated based on the **Speedtype** selected.

Create New Request

Required field *

Request Policy *
*UTEP T&E Request policy (NIT)
*UTEP Juarez Request Policy
*UTEP T&E Request policy (NIT)

Request/ Trip Name *

Request/Trip End Date *
MM/DD/YYYY

Request/Trip Purpose *

Departure City
Destination City *

Destination Country/Region
Search by Country/Region

Traveler Type *
Employee

Trip Type *

Will this Trip contain personal travel? *

Personal Dates of travel ?
Additional Information 0/500

Business Unit *
(UTEP1) El Paso

1 Department *
(301100) Budget and Payroll Svcs

2 Speedtype *
(19021300) Budget & Payroll Svcs

3

Fund Code *
(3105) DES Designated Tuition

4

Comments To/From Approvers/Processors 0/500

Cancel Create Request

Click **Create Request** when all fields are completed and ready to proceed with adding estimated expenses.

Need help finding your speed type?

- Use the Cost Center Project Lookup Dashboard to find your SpeedChart, Cost Center, or project information.
- Available on the [UTEP Concur Resources Page](#).



Cost Center/Project Lookup Dashboard

9/9/2026 9:53:45 PM
Barkest LastRefresh

Division

All

Unit

All

DepartmentDescription

All

Cost Center / Project

Enter Cost Center

Division	Unit	Department	DepartmentDescription	Cost Center	Function	FunctionDescription	Fund	FundDescription	SpeedType	SpeedTypeDescr
		301150	Financial Reporting	19049003 - Tech Stock Investments	700	Institutional Support	3100	DES Organized Act Rel to Instr	19049003	Tech Stock Invest
		301150	Financial Reporting	226621010A - REPORTING ADJ - INSTRUCTI	100	Instruction	5200	RES State Sponsored Programs	226621010A	REPORTING ADJ
		301150	Financial Reporting	226621020A - REPORTING ADJ - RESEARCH	200	Research	5200	RES State Sponsored Programs	226621020A	REPORTING ADJ
		301150	Financial Reporting	226621030A - REPORTING ADJ - PUBLIC SE	300	Public Service	5200	RES State Sponsored Programs	226621030A	REPORTING ADJ
		301150	Financial Reporting	226990099A - THIS ACCOUNT TO BE USED A	714	Institutional Support-Spon Prg	5400	RES Private Sponsored Programs	226990099A	THIS ACCOUNT 1
		801200	Ctr for Defense Systems Rsch	19508769 - RESEARCH INCENTIVE PROGRAM ID	200	Research	3135	DES IDC Indirect Cost Recovery	19508769	RESEARCH INCEI
		801200	Ctr for Defense Systems Rsch	226020364A - ASSESSMENT STUDY FOR T&E	200	Research	5100	RES Federal Sponsored Programs	226020364A	ASSESSMENT STI
		801200	Ctr for Defense Systems Rsch	226350936A - CDSR-09-0001: ADMINISTRAT	200	Research	5100	RES Federal Sponsored Programs	226350936A	CDSR-09-0001: A
		801200	Ctr for Defense Systems Rsch	226350948A - EMBEDDED ELECTRONICS WITH	200	Research	5100	RES Federal Sponsored Programs	226350948A	EMBEDDED ELEC
		801200	Ctr for Defense Systems Rsch	226350950A - MULTI-FRAME BLIND DECONVO	200	Research	5100	RES Federal Sponsored Programs	226350950A	MULTI-FRAME BI
		801200	Ctr for Defense Systems Rsch	226351016A - U.S. BORDER PATROL BOOT H	200	Research	5100	RES Federal Sponsored Programs	226351016A	U.S. BORDER PAT
		801200	Ctr for Defense Systems Rsch	226351017A - US BORDER PATROL FENCE PR	200	Research	5100	RES Federal Sponsored Programs	226351017A	US BORDER PATR
		801200	Ctr for Defense Systems Rsch	226351018A - US BORDER PATROL: STORMS	200	Research	5100	RES Federal Sponsored Programs	226351018A	US BORDER PATR
		801200	Ctr for Defense Systems Rsch	226351019A - US BORDER PATROL: UGS SOL	200	Research	5100	RES Federal Sponsored Programs	226351019A	US BORDER PATR
		801200	Ctr for Defense Systems Rsch	226351060A - AHPCR TASK 2273-429: MOD	200	Research	5100	RES Federal Sponsored Programs	226351060A	AHPCR TASK 22
		801200	Ctr for Defense Systems Rsch	226351122A - MODELING SOCIO-CULTURAL P	200	Research	5100	RES Federal Sponsored Programs	226351122A	MODELING SOCI
		801200	Ctr for Defense Systems Rsch	226351196A - STR-DESIGN AND ANALYSIS	200	Research	5100	RES Federal Sponsored Programs	226351196A	STR-DESIGN AN
		801700	Regional Geospatial Supp Ctr	19508648 - RESEARCH INCENTIVE PROGRAM VIC	200	Research	3100	DES Organized Act Rel to Instr	19508648	RESEARCH INCEI
ATHLETICS	ATHLETICS	208000	Athletics	19010039 - DISC FND ATHLETICS	700	Institutional Support	3100	DES Organized Act Rel to Instr	19010039	DISC FND ATHLE
ATHLETICS	ATHLETICS	208000	Athletics	19040020 - SUN BOWL EVENTS	700	Institutional Support	3100	DES Organized Act Rel to Instr	19040020	SUN BOWL EVEN
ATHLETICS	ATHLETICS	208000	Athletics	19040021 - CUSA Officials Testing	700	Institutional Support	3100	DES Organized Act Rel to Instr	19040021	CUSA Officials Te
ATHLETICS	ATHLETICS	208000	Athletics	19042000 - MINER FOUNDATION	700	Institutional Support	3100	DES Organized Act Rel to Instr	19042000	MINER FOUNDAT
ATHLETICS	ATHLETICS	208000	Athletics	19558600 - ATHLETIC SUMMER CAMPS	100	Instruction	3100	DES Organized Act Rel to Instr	19558600	ATHLETIC SUMM
ATHLETICS	ATHLETICS	208000	Athletics	19558690 - Men's Basketball Camp	100	Instruction	3100	DES Organized Act Rel to Instr	19558690	Men's Basketbal

Adding in Travel Allowances / Meal Per Diem

≡

SAP Concur

BR

Home / Requests / Manage Requests / Testing 5 Trip

Testing 5 Trip

Not Submitted | Request ID: 33KH | 08/25/2026 - 08/28/2026

Request Details

Print/Share

Attachments

Manage Travel Allowance

Notify Employee

Copy Request

Delete Request

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

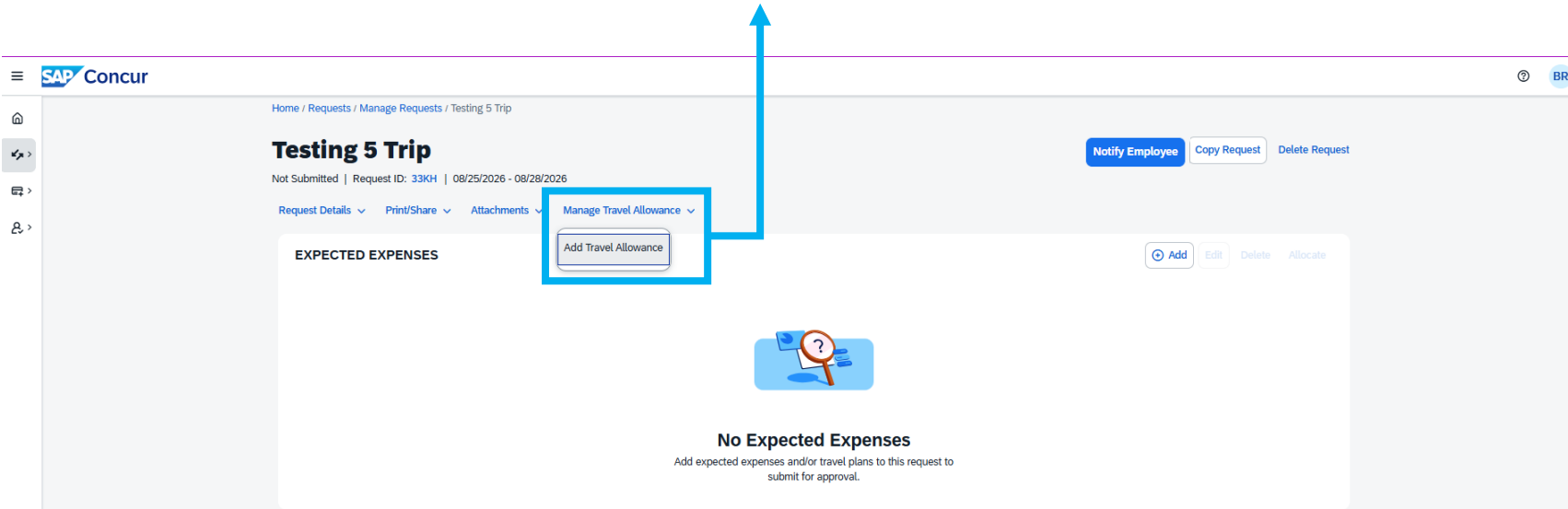


No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

Adding in Travel Allowances / Meal Per Diem

To add meal per diem expenses, click the **Manage Travel Allowance** link with drop down menu and select **Add Travel Allowance**.



The screenshot displays the SAP Concur interface for a request titled "Testing 5 Trip". The breadcrumb trail at the top reads "Home / Requests / Manage Requests / Testing 5 Trip". The page status is "Not Submitted" with a request ID of "33KH" and a date range of "08/25/2026 - 08/28/2026". Action buttons include "Notify Employee", "Copy Request", and "Delete Request". A dropdown menu is open under "Manage Travel Allowance", showing the "Add Travel Allowance" option highlighted with a blue box. A blue arrow points from this box to the text above. Below the dropdown, the "EXPECTED EXPENSES" section is empty, displaying a "No Expected Expenses" message with an icon of a magnifying glass over a document with a question mark. The message states: "Add expected expenses and/or travel plans to this request to submit for approval."

Home / Requests / Manage Requests / Testing 5 Trip

Testing 5 Trip

Not Submitted | Request ID: 33KH | 08/25/2026 - 08/28/2026

Request Details ▾ Print/Share ▾ Attachments ▾ Manage Travel Allowance ▾

Add Travel Allowance

Notify Employee Copy Request Delete Request

⊕ Add Edit Delete Allocate



No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

Adding in Travel Allowances / Meal Per Diem

Travel Allowance

Itinerary

Itinerary Name * ☐ Detailed Itinerary ☐ Day trip past midnight (no overnight stay) * Required

Start Location * Start Date * Start Time *

+ Add Destination

Arrival Location *

+ Add Destination

End Location * End Date * End Time *

Next: Adjust your travel allowance

1. Fill in the **start time** and **end time**.
2. These times can be estimates if exact times are not known (for example, 8am and 5pm).
3. Click **Next**.

Adding in Travel Allowances / Meal Per Diem

Travel Allowance

Adjustments

We can add more directions on this screen if you like to communicate to the end users. Again you have 512 characters.

View: [Adjustments](#) [Show Filters](#)

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging
All Days Dates: 5	☐	☐	☐	☐	☐
Mon, 10/12/2026 Dallas, UNITED STATES ?	☐	☐	☐	☐	☐
Tue, 10/13/2026 Dallas, UNITED STATES ?	☐	☐	☐	☐	☐
Wed, 10/14/2026 Dallas, UNITED STATES ?	☐	☐	☐	☐	☐
Thu, 10/15/2026 Dallas, UNITED STATES ?	☐	☐	☐	☐	☐
Fri, 10/16/2026 Dallas, UNITED STATES ?	☐	☐	☐	☐	☐

- **Reimbursement Amount** lists the meal per diems amounts per travel date and location with total at the bottom.
- **Allowance Limit** lists the lodging max limit per travel date and location with total at the bottom.

Allowance Limit ?	Reimbursement Amount ?
\$170.00	\$60.00
\$170.00	\$80.00
\$170.00	\$80.00
\$170.00	\$80.00
\$0.00	\$60.00
Total: \$680.00	Total: \$360.00

- Check boxes provided allow for meal per diems to be removed for specific meals on specific days or for the full day or for lodging to be removed for a specific day.
- This should be used in the case when meals or lodging are provided by a third party during the travel.

[Back](#)

[Finish](#)

[Cancel](#)

Adding in Travel Allowances / Meal Per Diem

- To view the **Reimbursement Details**, click the **Adjustment** link drop-down and select Reimbursement Details.
- When per diems are complete, select the **Save button**.

Travel Allowance

Adjustments

Here you can declare any free meals received to reduce to your company policy guidelines.

View: [Adjustments](#) [Show Filters](#)

Date/	✓ Adjustments	Exclude Day
All Dates	Reimbursement Details	☐
Mon, 09/14/2026		☐
Dallas, UNITED STATES ?		
Tue, 09/15/2026		☐
Dallas, UNITED STATES ?		
Wed, 09/16/2026		☐
Dallas, UNITED STATES ?		

Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: [Reimbursement Details](#)

Date	Location	Rate Type	Information	Rate Amount	Factor	Adjustments	Calculated Amount	Allowance Limit	Reimbursement Amount
Mon, 09/14/2026	Dallas, UNITED STATES	Meals		\$75.00	0.75000000	(\$53.00)	\$3.25	\$0.00	\$3.25
	Dallas, UNITED STATES	Lodging	Over Limit Tracking	\$170.00	1.00000000	\$0.00	\$170.00	\$170.00	\$0.00
								\$170.00	\$3.25
Tue, 09/15/2026	Dallas, UNITED STATES	Meals		\$75.00	1.00000000	(\$53.00)	\$22.00	\$0.00	\$22.00
	Dallas, UNITED STATES	Lodging	Over Limit Tracking	\$170.00	1.00000000	\$0.00	\$170.00	\$170.00	\$0.00
								\$170.00	\$22.00
Wed, 09/16/2026	Dallas, UNITED STATES	Meals		\$75.00	0.75000000	(\$53.00)	\$3.25	\$0.00	\$3.25
								\$0.00	\$3.25
								Total: \$340.00	Total: \$28.50

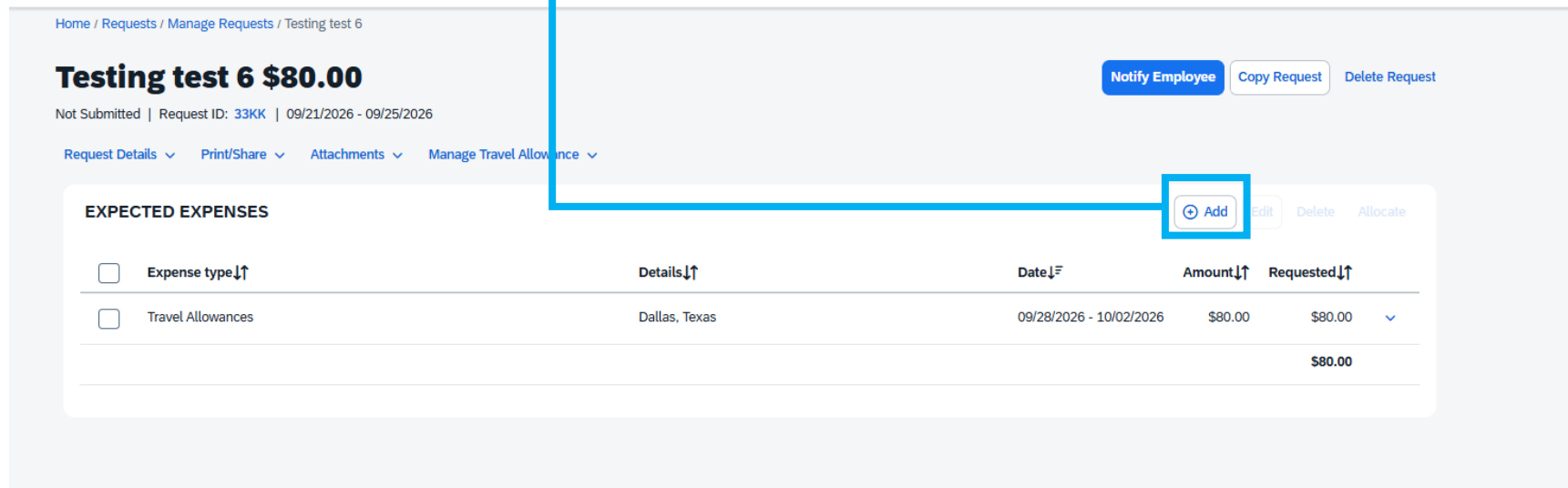
Save

Cancel

Adding in Expenses to a Travel Request

Once your Travel Request is created, the user should add all the estimated expenses related to the trip.

- Click the **Add** button to add expense types for other travel expenses expected for this trip.



The screenshot displays a web interface for managing travel requests. At the top, a breadcrumb trail reads 'Home / Requests / Manage Requests / Testing test 6'. The main heading is 'Testing test 6 \$80.00'. Below this, it states 'Not Submitted | Request ID: 33KK | 09/21/2026 - 09/25/2026'. A navigation bar includes links for 'Request Details', 'Print/Share', 'Attachments', and 'Manage Travel Allowance'. On the right, there are buttons for 'Notify Employee', 'Copy Request', and 'Delete Request'. The 'EXPECTED EXPENSES' section features a table with columns for 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. A blue arrow points from the 'Add' button (a button with a plus icon and the text 'Add') to the 'Expense type' column header. The table contains one row for 'Travel Allowances' with details 'Dallas, Texas', dates '09/28/2026 - 10/02/2026', and amounts of '\$80.00' for both 'Amount' and 'Requested'. A total of '\$80.00' is shown at the bottom of the table.

Home / Requests / Manage Requests / Testing test 6

Testing test 6 \$80.00

Not Submitted | Request ID: 33KK | 09/21/2026 - 09/25/2026

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

[Notify Employee](#) [Copy Request](#) [Delete Request](#)

EXPECTED EXPENSES

☐ Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
☐ Travel Allowances	Dallas, Texas	09/28/2026 - 10/02/2026	\$80.00	\$80.00 ▼
				\$80.00

Adding in Expenses to a Travel Request

Once your Travel Request is created, the user should add all the estimated expenses related to the trip.

- When you click add, **select an expected expense from the list**, then click **save**.

Add expected expenses and/or travel plans

Search by expense type, category, description  [Collapse All Sections](#)

- ^ 01. Travel Expenses
 - TR-Lodging
- ^ 02. Transportation
 - TR-Airfare
 - TR-Mileage
 - TR-Rental Car
- ^ 05. Non-Travel Other
 - NT-Awards-Non-Employees

Adding in Expenses to a Travel Request

Once your Travel Request is created, the user should add all the estimated expenses related to the trip.

- Complete the required fields for the new expense and click **Save**.
- The expense will now appear under **Expected Expenses** on the travel request.

Home / Requests / Manage Requests / Testing test 6 / New Expense: TR-Rental Car

New Expense: TR-Rental Car

[Allocate](#) [Save](#) [Cancel](#)

Required field *

Transaction Date * 10/64
09/21/2026

Description
Enterprise

Transaction Amount *
650.00

Currency *
US, Dollar (USD)

Trip Type
In State

Comment
0/200

[Save](#) [Cancel](#)

EXPECTED EXPENSES					Add	Edit	Delete	Allocate
☐	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓			
☐	Travel Allowances	Dallas, Texas	09/28/2026 - 10/02/2026	\$80.00	\$80.00			
☐	TR-Rental Car	Enterprise	09/21/2026	\$650.00	\$650.00			
				\$730.00				

Adding Cash Advances

- To add a cash advance, select **Request Details** and click **Add Cash Advance**.
- Complete the required fields, then select **Save**. The cash advance will be added to your travel request.

Athletics Recruiting Trip
Sent Back to Employee | Request ID: 33NK | 09/21/2026 - 09/23/2026

Request Details ▾ | Print/Share ▾ | Attachments ▾

Request

Edit Request Header

Request Timeline

Audit Trail

Linked Add-ons

Add Cash Advance

EXPENSES
Car Rental
Airfare



Athletics Recruiting Trip - Test Submit Save Cancel

[Cash Advance Timeline](#) [Manage Attachments](#)

[Details](#) [Expenses](#)

Cash Advance Amount * Currency * Travel Start Date * Required field

Travel End Date Requested Disbursement Date 167/2000

Cash Advance Comment

I am traveling to evaluate a prospective student-athlete for recruiting purposes and am requesting a cash advance to cover anticipated travel expenses during the trip.



Best Practice:

Cash advances should be used sparingly and only when necessary. Alternative payment methods are preferred whenever available.

Adding Cash Advances

Athletics Recruiting Trip - Test 

09/23/2026

[Cash Advance Timeline](#) [Manage Attachments](#)



Cash Advance Timeline

Athletics Recruiting Trip - Test \$500.00

Approval Flow [Edit](#)

☐ Cash Advance Reviewed

Comments History

Cash Advance Comment
Brittany Ramirez 09/23/2026
I am traveling to evaluate a prospective student-athlete for recruiting purposes and am requesting a cash advance to cover anticipated travel expenses during the trip.

- Once a cash advance is created, you can use the **Cash Advance Timeline** to track its progress through the approval workflow.
- Any associated cash advances will also appear at the top of the request for easy reference.

Athletics Recruiting Trip - Test \$1,895.00

[Notify Employee](#) [Copy Request](#) [Cancel Request](#)

Sent Back to Employee | Request ID: 33NK | 09/21/2026 - 09/25/2026 | [View Timeline](#)

[Request Details](#) [Print/Share](#) [Attachments](#)

CASH ADVANCES: 1

Amount
\$500.00

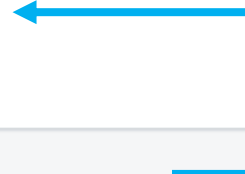
EXPECTED EXPENSES

☐ [Comment](#) [Expense type](#) [Details](#) [Add](#) [Edit](#) [Delete](#) [Allocate](#)

Date [Date](#) [Amount](#) [Requested](#)

Notifying **Traveler** to Submit Travel Request

- Once all expected expenses have been added click the **Notify Employee** button.
- This will let them know that they need to go into concur and click **submit**.
- Review alerts to ensure that all required information and attachments have been provided. Missing information and attachments may result in workflow delays.



Home / Requests / Manage Requests / Testing test 6

Testing test 6 \$80.00

Not Submitted | Request ID: 33KK | 09/21/2026 - 09/25/2026

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

[Notify Employee](#) [Copy Request](#) [Delete Request](#)

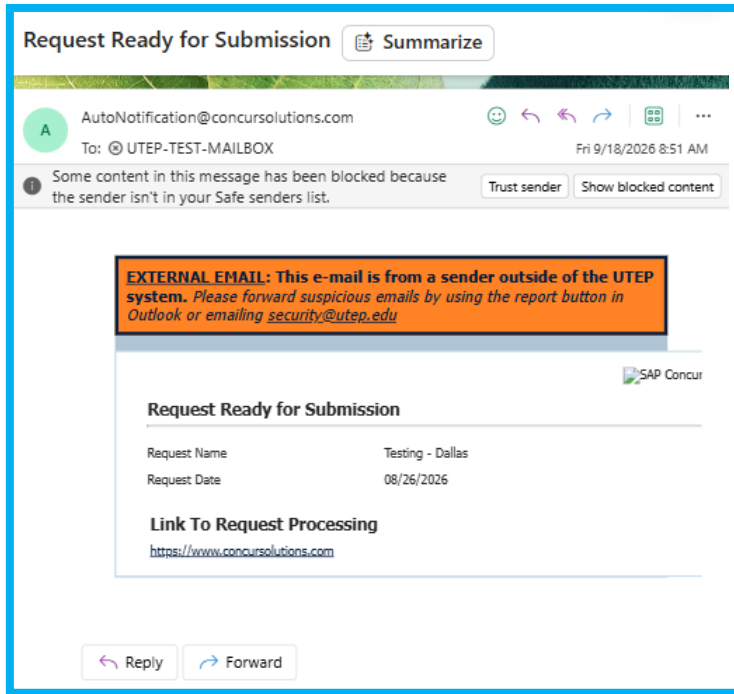
i Info

A notification has been sent to the employee.

[Close](#)

Traveler's Email to Submit Travel Request

Traveler receives this notification via email



Traveler's POV to Submit Travel Request

Traveler click link on email and it takes them to the expense report, the can review and submit report.

Traveler's POV

- When they receive the email and go to the expense report and click **Submit Report** the **Report Totals** window will appear. They will review the summary and select **Submit Report** again to continue.

Testing test 6 \$1,895.00

Not Submitted | Request ID: [33KK](#) | 09/21/2026 - 09/25/2026

[Submit Request](#)[Copy Request](#)[Cancel Request](#)

[Request Details](#) [Print/Share](#) [Attachments](#) [Manage Travel Allowance](#)

EXPECTED EXPENSES

[Add](#)[Edit](#)[Delete](#)[Allocate](#)

☐	Comment↓↑	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
☐		Car Rental	Enterprise Rental	09/21/2026	\$630.00	\$630.00
☐		Airfare	Flying there and back	09/21/2026	\$1,265.00	\$1,265.00
						\$1,895.00

Traveler's POV to Submit Travel Request

- The User **Electronic Agreement** will appear after they submit the report.
- They will review the agreement and select **Accept & Continue**.
- The report will then be successfully submitted and routed through the approval process.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Accept & Continue Cancel

Report Status

 **Report Submitted**

Britt's Office Purchase (MD) | \$155.53

Close

Travel Request - Status Tracking

- Once submitted by the Traveler the Travel Request tile will show the status and which area the request is pending approval from.

Home / Requests / Manage Requests

Manage Requests

Requests View: Active Requests ▾

Search:

Testing test 6
09/21/2026 | 33KK

\$662.00

Submitted

Pending External Validation

Travel Request - How to check the status on requests

Home / Requests / Manage Requests / Testing test 6

Testing test 6 \$662.00

Sent Back to Employee | Request ID: 33KK | 09/21/2026 - 09/21/2026

Request Details ▾ | Print/Share ▾ | Attachments ▾ | More ▾

- Request
- Edit Request Header
- Request Timeline**
- Audit Trail
- Linked Add-ons
- Add Cash Advance

- Within the Travel Request, navigate to the **Request Details** link directly below the Request name. Select **Request Timeline** from the drop-down menu.

Request Timeline

Testing test 6 | \$662.00

Approval Flow

Edit



Icon Indicator meaning:

- Pending approval** step will display a blue clock icon
- Approved approval** step(s) will display a circle with a blue checkmark
- Future pending approval** step(s) will display an empty circle.

Request Summary

Sort ▾ | Filter ▾

Request Comment

0/500

Thursday, August 20, 2026

Status: Sent Back to Employee
Status Updated: Concur System
Aug 20, 2026 4:17 PM

Comment

Concur System Aug 20, 2026 4:17 PM

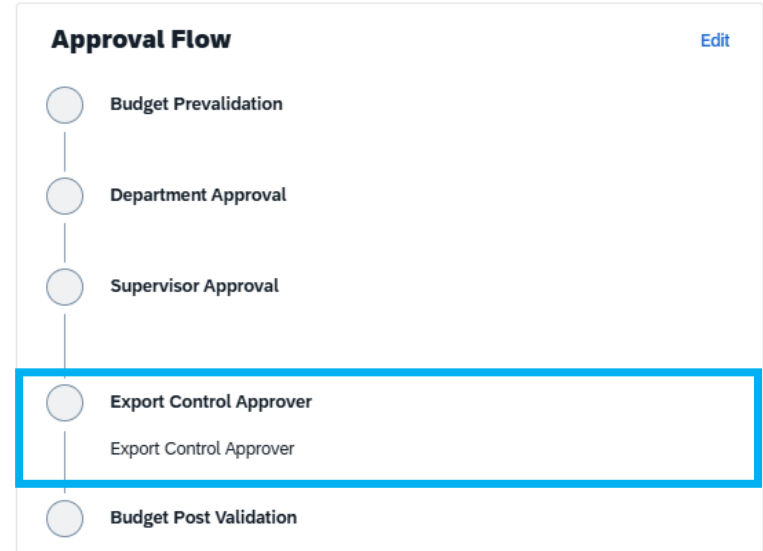
Line: 1, Split: 1 - „Budget Check Exception: OPE.SpeedType = 19021300, Account = 62491.Available funds exceeded. Current Available Balance = -10266.18 and Expense amount for this Budget is: 662,

Status: Pending External Validation
Status Updated: Brittany Ramirez
Aug 20, 2026 4:17 PM

Status: Submitted
Status Updated: Brittany Ramirez
Aug 20, 2026 4:17 PM

Travel Request Status Tracking – International Travel

- Every Travel Request with an **international destination** routes to **Export Control** for approval, the step is added automatically.
- Requests to restricted regions also route to the **International Oversight Committee (IOC)**.
- These workflows did not exist in PeopleSoft, they are built into Concur.
- Use the Request Timeline to see where the request sits, and plan for the extra step when timing your submission.



Travel Request – Budget Validation Error

Pending External Validation indicates that Budgeting is reviewing the request to verify funding and ensure there are no budget-related issues. If funding is unavailable or a correction is needed, the request will be returned to the requestor for updates. Any status changes and comments will be communicated **by email** and can also be viewed in the **request's timeline** and **audit trail** within Concur.

Testing test 6
09/21/2026 | 33KK

\$730.00

Submitted

Pending External Validation

Summary by Copilot

AutoNotification@concur.com
To: Ramirez, Brittany D
Thu 10/1/2026 4:10 PM

Some content in this message has been blocked because the sender isn't in your Safe senders list. Trust sender Show blocked content

EXTERNAL EMAIL: This e-mail is from a sender outside of the UTEP system. Please forward suspicious emails by using the report button in Outlook or emailing security@utep.edu

SAP Concur

Your travel request listed below has changed status.

Changed By	Concur System
Request ID	33KK
Request Name	Testing test 6
Request Date	08/20/2026
Submit Date	10/01/2026
Total Posted Amount	730.00 USD

Approval Status Set To Sent Back to Employee

Approver's Comments

Line: 1, Split: 1 - _Budget Check Exception: OPE.SpeedType = 19021300, Account = 62491, Available funds exceeded. Current Available Balance = -10266.18 and Expense amount for this Budget is: 662.
Line: 1, Split: 1 - _Budget Check Exception: OPE.SpeedType = 19021300, Account = 62491, Available funds exceeded. Current Available Balance = -10266.18 and Expense amount for this Budget is: 662.
Line: 1, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period; Line: 2, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period; Line: 3, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period.

Link To Request Processing
<https://www.concursolutions.com>

Travel Request – Budget Validation Error

The Report Timeline provides a chronological view of the request's progress, including status changes, approvals, returns, and comments made throughout the process.

Manage Requests

Requests

View: Active Requests

Testing test 6

09/21/2026 | 33KK

\$730.00

Returned

Sent Back to Employee

Request Timeline

Testing test 6 | \$730.00

Approval Flow

Edit

- Budget Prevalidation
- Department Approval
- Supervisor Approval
- Cash Advance Approver
- Budget Post Validation

Request Summary

Sort Filter

Request Comment 0/500

Thursday, October 1, 2026

Status: Sent Back to Employee
Status Updated: Concur System
Oct 1, 2026 6:10 PM

Comment

Concur System Oct 1, 2026 6:10 PM
Line: 1, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period..Line: 2, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period..Line: 3, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period..

Status: Pending External Validation
Status Updated: Brittany Ramirez
Oct 1, 2026 6:10 PM

Status: Submitted
Status Updated: Brittany Ramirez
Oct 1, 2026 6:10 PM

Close

Travel Request – Budget Validation Error

The Audit Trail captures a detailed history of actions taken on the request, including who made changes, what was updated, and when the activity occurred.

Audit Trail			
Testing test 6 \$730.00			
Request Level			
Date/Time↓↑	Updated By↓↑	Action↓↑	Description↓↑
10/01/2026 4:10 PM	Concur System	Approval Status Change	Status changed from Pending External Validation to Sent Back to Employee Comment: Line: 1, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period.,Line: 2, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period.,Line: 3, Split: 0 - Accounting Date: 2026-10-01 falls in a closed accounting period., Step Name: Budget Prevalidation
10/01/2026 4:10 PM	Brittany Ramirez	Approval Status Change	Status changed from Submitted to Pending External Validation Comment: Step Name:
10/01/2026 4:10 PM	Brittany Ramirez	Approval Status Change	Status changed from Not Submitted to Submitted Comment: Step Name: Request Submitted
10/01/2026 4:10 PM	Brittany Ramirez	Confirmation Agreement Acceptance	UTEP Request User Submit Agreement

Live Demo

Break for 10 mins

Hands on Training – Travel Request

Your turn — create a request in the training site

Practice scenario

You are attending a three-day conference in Chicago. Registration is paid in advance, you will fly, stay two nights, and drive to the airport.

Build a Travel Request that includes:

- Correct request policy and trip type
- Trip purpose, dates, and destination
- Department, SpeedType, and Fund Code
- Airfare, lodging, and rental car estimates
- Meal per diem through Travel Allowance

What good looks like

No open alerts

Every alert is cleared or explained before you submit

Right funding

Fund Code matches the SpeedType you selected

Realistic estimates

Estimates are close to what you expect to actually spend

Ready to submit

Required fields complete and the request created

Project team members are in the room — raise your hand and we will work through your document with you.

How Approval Routing Works

Approvals required today are still required in Concur

Standard Routing

Travel requests route to the supervisor in PeopleSoft, then to the funding source approver. There is no dollar-limit escalation.

Grant Travel

Grant travel routes to the PI and then to Grants Management, exactly as it does today.

Policy Exceptions

Missing Receipt Declarations and over-threshold items route for additional review — travel to the dean or VP, entertainment to the VP for Business Affairs.

Fewer Redundant Approvals

If costs were approved on the request and stay within the approved amount, the expense report moves to final review without repeating those approvals.

What you will see

- Approval emails when a document needs your attention
- Return notifications when something comes back to you
- Recall options while a document is still in workflow
- Status tracking and full approval history on every document

Chicago Trip Example

When actual costs stay within the amount approved on the Travel Request

SCENARIO Three-day conference in Chicago • Registration paid in advance • Airfare • Two hotel nights • Drive to the airport

1 Travel Request Estimate

Airfare	\$500
Hotel, 2 nights	\$500
Mileage to airport	\$40
Meals & incidentals	\$150
APPROVED TOTAL	\$1,190



After travel

2 Actual Expense Report

Airfare	\$307
Hotel, 2 nights	\$425
Mileage to airport	\$20
Meals & incidentals	\$130
ACTUAL TOTAL	\$882



**Within the
approved
amount**

The report may move
to final review
without repeating the
same approvals.

Important: This reduced-approval example does not apply to expenses involving project IDs. Policy exceptions may also require additional review.

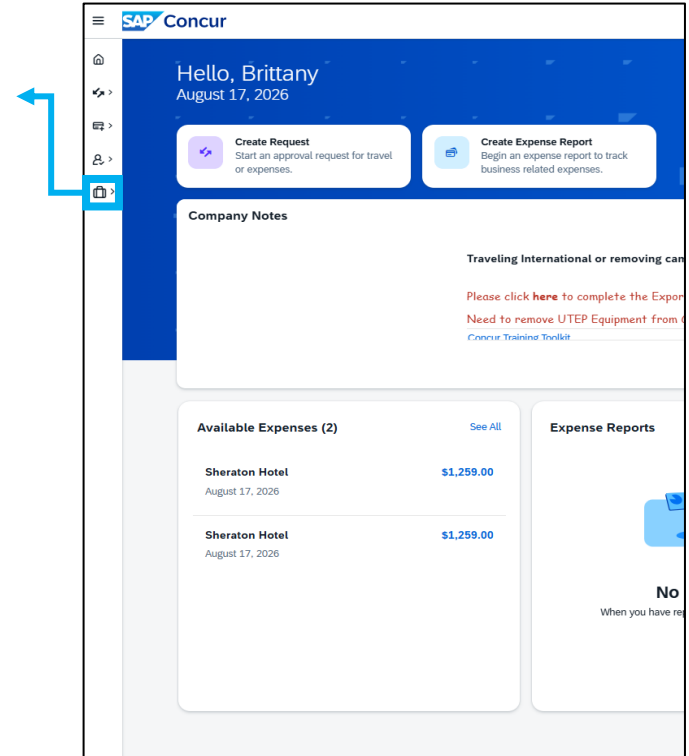
Booking with Concur

STEP TWO

How to Booking with Concur

Where to find it?

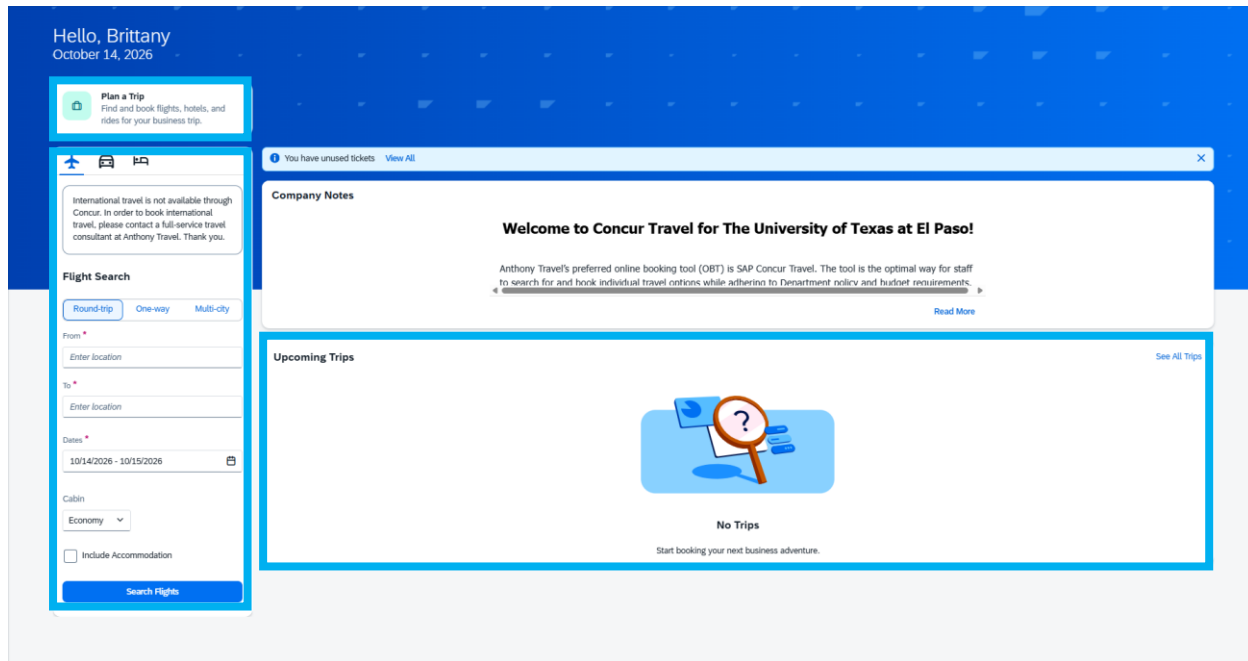
- From the **Concur Home** page, select the **Travel** icon located in the left navigation menu.
- This will open the **Book Travel** interface, where you can begin searching for flights, hotels, and rental cars.



How to Booking with Concur

Booking Interface

- Use the tabs to search for **flights, hotels, or rental cars**.
- Enter your travel details and select **Search**.
- View and manage upcoming reservations in the **Upcoming Trips** section.
- You can also begin a new reservation by selecting **Plan a Trip**.



How to Booking with Concur

Start Booking a Flight

- After entering your trip details, Concur displays available flight options based on your search criteria.
- Use the available **filters** to narrow your results and find the option that best meets your travel needs.





El Paso (ELP) - Atlanta (ATL)
Departure Date: Tuesday, December 8, 2026

[Skip Search](#) [Edit Search](#) [Currency: USD](#)

All Filters

Flight Number

Matrix

Nonstop

Delta

Time

Flexibility

Policy

Class of Service (4)

Reset

Sort by Price - Low to High

Show Details

2 of 94 Flights

Round-trip fares include taxes and fees. Additional fees will be shown at checkout.

 6:00 AM - 10:58 AM ELP - ATL • Nonstop • 2h 58m More Preferred	Delta Main Classic Round-trip  \$1,007	Delta Comfort Classic Round-trip  \$1,069	Delta Main Extra Round-trip  \$1,243	Delta Comfort Extra Round-trip  \$1,393
 2:21 PM - 7:19 PM ELP - ATL • Nonstop • 2h 58m More Preferred	Delta Main Classic Round-trip  \$1,007	Delta Comfort Classic Round-trip  \$1,069	Delta Main Extra Round-trip  \$1,243	Delta Comfort Extra Round-trip  \$1,393

We don't have any more. Try changing your filters or modifying your search. [Open Filters](#) | [Edit Search](#)

How to Booking with Concur

Start Booking a Flight

- Select **Show Details** to expand the flight results.





El Paso (ELP) - Atlanta (ATL)
Departure Date: Tuesday, December 8, 2026

[Skip Search](#) [Edit Search](#) [Currency: USD](#)

[All Filters](#)

[Matrix](#)

[Nonstop](#)

[Delta](#)

[Time](#)

[Flexibility](#)

[Policy](#)

[Class of Service \(4\)](#)

[Reset](#)

[Sort by Price - Low to High](#)

Show Details

2 of 94 Flights

Round-trip fares include taxes and fees. Additional fees will be shown at checkout.

 Delta 6:00 AM - 10:58 AM ELP - ATL • Nonstop • 2h 58m More Preferred	Delta Main Classic Round-trip  \$1,007	Delta Comfort Classic Round-trip  \$1,069	Delta Main Extra Round-trip  \$1,243	Delta Comfort Extra Round-trip  \$1,393
 Delta 2:21 PM - 7:19 PM ELP - ATL • Nonstop • 2h 58m More Preferred	Delta Main Classic Round-trip  \$1,007	Delta Comfort Classic Round-trip  \$1,069	Delta Main Extra Round-trip  \$1,243	Delta Comfort Extra Round-trip  \$1,393

We don't have any more. Try changing your filters or modifying your search. [Open Filters](#) | [Edit Search](#)

How to Booking with Concur

Start Booking a Flight

- Review the flight schedule, duration, aircraft information, and available fare options.
- Select the **policy indicator** to view why a fare is marked **Out of Policy** or **Not Allowed**.
- Review included amenities, baggage allowances, refundability, and change restrictions.
- Select **Fare Details** for additional information or select **Select Fare** to continue with the preferred option.

The screenshot displays the Concur flight booking interface. On the left, flight details for Delta DL 1741 are shown, including the route (ELP - ATL), departure time (6:00 AM), arrival time (10:58 AM), duration (2h 58m), aircraft (Boeing 737-900), and on-time performance (80%). The flight is from Hartsfield-Jackson Atlanta International Airport.

In the center, a modal window titled "Out of Policy" is displayed, indicating that the selected fare violates company travel rules. The modal text states: "This option violates one or more of your company travel rules. Not Allowed. Marketing airline is in Delta -and- Fare uses class of service E. This is a Basic Economy fare which has the following restrictions: No pre-reserved seat assignment, no overhead carry-on bag (only 1 personal item allowed for under-seat storage), no priority boarding, no upgrade allowed, non-refundable. This is a Basic Economy fare which has the following restrictions: Non-refundable and non-changeable unless you upgrade to Choice Preferred or..."

Below the modal, four fare options are listed:

- Economy** (Delta Main Classic): Standard legroom seat, 1 carry-on bag included, 1st checked bag for \$45, 2nd checked bag for \$55, Nonrefundable, Free advanced changes, No same day changes allowed. Round-trip price: \$831. Status: Not Allowed.
- Economy** (Delta Comfort Classic): Above average legroom seat, 1 carry-on bag included, 1st checked bag for \$45, 2nd checked bag for \$55, Nonrefundable, Free advanced changes, Free same day changes, Priority boarding included. Round-trip price: \$1,007.
- Economy** (Delta Main Extra): Standard legroom seat, 1 carry-on bag included, 1st checked bag for \$45, 2nd checked bag for \$55, Fully refundable, Free advanced changes, Free same day changes, Priority boarding included. Round-trip price: \$1,069.
- Economy** (Delta Main Extra): Standard legroom seat, 1 carry-on bag included, 1st checked bag for \$45, 2nd checked bag for \$55, Fully refundable, Free advanced changes, Free same day changes, Priority boarding included. Round-trip price: \$1.

Each fare option has a "Fare Details" link and a "Select Fare" button. The "Select Fare" button for the \$1,069 fare is highlighted with a purple box.

How to Booking with Concur

Review and book your trip

- Next you can select seats, if available.

Seats

Select your preferred seats. For any flights where you do not pre-select a seat, one may be auto-assigned based on your preferences and carrier availability.

El Paso, TX (ELP) - Atlanta, GA (ATL)

Cabin: Economy

Select Seats

Seat Map

Departing Return

ELP - ATL

El Paso International Airport (ELP) - Hartsfield-Jackson Atlanta International Airport (ATL)

Tuesday, 12/08/2026 6:00 AM - 10:58 AM Duration: 2h 58m

✈ Delta DL 1741 Boeing 737-900 Passenger

☐ Available

☐ Available (Fee)

☒ Unavailable

☒ Selected

☐ Accessible

☐ Exit

☐ Lavatory

☐ Galley

☐ Closet

Economy

	A	B	C	D	E	F
15	☐	☐	☒	☒	☒	☒
16	☒	☒	☒	☒	☒	☒
17	☒	☒	☒	☒	☒	☒
18	☒	☒	☒	☒	☒	☒
19	☒	☒	☒	☒	☒	☒
20	☒	☒	☒	☒	☒	☒
21	☒	☒	☒	☒	☒	☒
22	☒	☒	☒	☒	☒	☒
23	☒	☒	☒	☒	☒	☒
24	☒	☒	☒	☒	☒	☒
25	☒	☒	☒	☒	☒	☒
26	☒	☒	☒	☒	☒	☒
27	☒	☒	☒	☒	☒	☒
28	☒	☒	☒	☒	☒	☒
29	☒	☒	☒	☒	☒	☒
30	☒	☒	☒	☒	☒	☒
31	☒	☒	☒	☒	☒	☒
32	☒	☒	☒	☒	☒	☒
33	☒	☒	☒	☒	☒	☒

-- No seat selected

Save Seats Next Flight Cancel

How to Booking with Concur

Review and book your trip

- Once you completed your booking review baggage allowances, fare rules, and travel policies.
- Select the correct **Form of Payment** and select “I have read and accept the rules ... etc.”
- When ready, select **Book and Continue** to proceed to the final booking review.

The screenshot displays the final booking review interface. At the top, the 'Estimated Total Cost' is \$1,006.88. Below this, a table breaks down the costs: 'Base Fare' at \$907.98 and 'Taxes, fees & charges' at \$98.90. The 'Payment' section shows a message indicating that the company's payment form is required. Under 'Form of Payment', 'Test Corporate Ghost Card (MASTERCARD)' is selected. A checkbox for accepting terms and conditions is present but unchecked. Links for 'Flight Fare Rules and Restrictions' and 'Hazardous Materials Restrictions' are provided. A yellow warning banner states that the selected fare is non-refundable. At the bottom, the 'Book and Continue' button is highlighted with a red border, and a 'Change Selections' link is located just below it.

Estimated Total Cost		\$1,006.88
Base Fare		\$907.98
Taxes, fees & charges	▼	\$98.90

Payment

i The form of payment listed below is required by your company, and will be used for this booking. You do not need to select a form of payment.

Form of Payment

Test Corporate Ghost Card (MASTERCARD)

☐ I have read and accept the rules and restrictions and policies. I authorize SAP Concur to share my Traveler Information and preferences with the travel provider. *

[Flight Fare Rules and Restrictions](#)

[Hazardous Materials Restrictions](#)

! You have selected a non-refundable fare. Review the rules and restrictions for more details.

Book and Continue

[Change Selections](#)

How to Booking with Concur

Finalizing Your Trip

- You will be sent to the **Finalize Screen**.
- Review all reservation details before submitting.
- You can still add a hotel and/or rental car if needed.

Finalize

Trip Overview *Required field

December 8, 2026 - December 10, 2026

Trip Name * 14/50
Trip - Atlanta

Description 0/250

✚ Hotel has not been selected: Hartsfield-Jackson Atlanta International Airport
You can still finalize the trip without completing this step. [Search Hotel](#) [Delete](#)

✚ Hotel has not been selected: Hartsfield-Jackson Atlanta International Airport
You can still finalize the trip without completing this step. [Search Hotel](#) [Delete](#)

✚ Hotel has not been selected: Hartsfield-Jackson Atlanta International Airport
You can still finalize the trip without completing this step. [Search Hotel](#) [Delete](#)

✚ **El Paso, TX (ELP) - Atlanta, GA (ATL)**
> Tuesday, December 8, 2026 [Confirmed](#)
Confirmation Number: H86YCD

Estimated Total Cost ? **\$1,006.88**

Flight ▼ **\$1,006.88**

[Finalize Trip](#)

[Cancel Trip](#)

[Hold Trip](#)

? You may hold this reservation until October 8, 2026, 10:00 PM EDT.

Would you like to book anything else?

[✚ Add Hotel](#) [✚ Add Rental Car](#)

How to Booking with Concur

Adding in a car/hotel

- From the **Finalize Booking** screen, select **Add Rental Car** or **Add Hotel**.
- Complete the **Add to Your Trip** pop-up window and select **Search**.
- Available car rental or hotel options will be displayed for selection.

Add to Your Trip

Please Note: Rates displayed from our contracted car vendors include collision damage waiver and liability damage waiver (CDW/LDW) insurance. Therefore, any additional insurance coverage that is opted into at the time of service is at the traveler's personal expense. Rental Cars will not be direct billed on Concur. However, you may book a car on Concur and then call Anthony Travel to direct bill the car for you.

Rental Car Search

Where would you like to pick up your car? Select one of your previous reservations to set the pick up location and date or enter the criteria manually.

Your Reservations

Flight: Hartsfield-Jackson Atlanta International Airport, 12/08/2026

Pickup *

Hartsfield-Jackson Atlanta International Airport

Drop-Off

Same Location

Dates *

12/08/2026 - 12/10/2026

Pickup Time * Drop-Off Time *

11:00 AM 11:00 AM

Search Close

How to Booking with Concur

Adding in a car/hotel

- Review the available rental car options.
- Select the vehicle that best meets your travel needs to continue.

Hartsfield-Jackson Atlanta International Airport (ATL)
Thursday, October 22, 2026 - Friday, October 23, 2026

Please Note: Rates displayed from our contracted car vendors include collision damage waiver and liability damage waiver (CDW/LDW) insurance. Therefore, any additional insurance coverage that is opted into at the time of service is at the traveler's personal expense. Rental Cars will not be direct billed on Concur. However, you may book a car on Concur and then call Anthony Travel to direct bill the car for you.

Vehicle Availability Alert – Chrysler Minivan Recall
Enterprise/National has issued a recall on Chrysler minivans, a major part of their fleet. Travelers with minivan or full-size SUV reservations over the next 1–2 months may experience limited availability or receive calls to confirm or adjust bookings. Please consider reaching out to your Travel Office for alternatives, especially for group or team travel, until this matter has been resolved with Enterprise/National.

Filters: All Filters | Make | Category | Rental Company | Sort by Category

66 results. Recommendations based on price and convenience.

Best rental cars for you

Vehicle	Price	Buttons
Intermediate TOYOTA COROLLA or similar 5 seats, 1 Automatic, Unlimited Mileage Air Conditioning Pickup & Drop-off Station: 2200 Rental Car Ctr Pkwy 2250, College Park (1.13 mi) Recommended Corporate Rate Most Preferred 30 kg CO ₂ e	\$74.11 \$74.11 Per Day	Select
Economy MITSUBISHI MIRAGE or similar 4 seats, 1 Automatic, Unlimited Mileage Air Conditioning Pickup & Drop-off Station: 2200 Rental Car Ctr Pkwy 2250, College Park (1.13 mi) Recommended Corporate Rate Most Preferred 28 kg CO ₂ e	\$71.54 \$71.54 Per Day	Select

All rental cars

Vehicle	Price
Economy MITSUBISHI MIRAGE or similar 4 seats, 1 Automatic, Unlimited Mileage	\$71.54 \$71.54 Per Day

Map: Hartsfield-Jackson Atlanta International Airport (ATL) area. Shows College Park, Egan Park, and various airport terminals. A callout indicates "5 more from \$71.54".

How to Booking with Concur

Adding in a car/hotel

- Review your selected rental car details and complete any required traveler information.
- Select **Book and Continue** to add the rental car reservation to your trip itinerary.

Review and Book

Rental Car Selection



Intermediate TOYOTA COROLLA or similar
\$5 1 1/2 Automatic 1/2, Unlimited Mileage
[Corporate Rate](#) [Most Preferred](#) 30 kg CO₂e

Booking includes
Air Conditioning

Pickup and Drop-off Station
Thursday, October 22, 2026 7:00 PM - Friday, October 23, 2026 11:00 AM
ATLANTA
2200 Rental Car Ctr Pkwy 2250
College Park GA 30337-0000
[Location Details](#)



Estimated Total Cost

Car Rental (Days: 1)	\$74.11
Payment	
Payment is not necessary at this time	
By reserving this trip, you agree that you have read and accept the rate rules and restrictions .	
Book and Continue	
Change Selection	

Traveler Information

Traveler information is based on your SAP Concur profile. Your information and any information you complete below will be shared with the travel provider to complete the booking process. Please ensure your name below matches what is on your government issued ID.

Name on Reservation
Brittany DeArna Ramirez

Phone *
+1-915-694-0635

Email
bdearned5@utep.edu

Frequent Traveler Account
Select an account

Flight Number (i.e. UA1234)
WN1340

[Add Frequent Traveler Account](#) [Edit Traveler Information](#)

Rental Car Preferences

Your comments will be shared with the rental car company.

Comments

0/60

Only alphanumeric characters are allowed.

How to Booking with Concur

Adding in a car/hotel

- The rental car will be added to your overall trip itinerary.
- The same process applies when adding a hotel reservation.
- A personal credit card is required to reserve a hotel room.

Finalize

Trip Overview

October 22, 2026 - October 23, 2026

Trip Name *

Trip - Atlanta

Description

1450

0/250

✈ El Paso, TX (ELP) - Atlanta, GA (ATL)

Thursday, October 22, 2026

Confirmation Number: B0BFUS

🚗 NATIONAL Rental Car

Thursday, October 22, 2026 - Friday, October 23, 2026

Confirmation Number: Z1407626ACQUINT

✈ Atlanta, GA (ATL) - El Paso, TX (ELP)

Friday, October 23, 2026

Confirmation Number: F77SCM

Additional Information

Your company has requested a few more details about this booking.

Speed Chart or Cost Center Number *

Enter text

Authorization ID *

Enter text

0/10

0/14

Estimated Total Cost ⓘ

\$1,187.25

Fight

\$1,113.14

Rental Car

\$74.11

Finalize Trip

Cancel Trip

Hold Trip

You may hold this reservation until October 15, 2026, 10:00 PM MDT.

Would you like to book anything else?

✚ Add Hotel

✚ Add Rental Car

How to Booking with Concur

Finalizing Your Trip

- Scroll down on the finalize screen and you will need to enter the appropriate **SpeedChart or Cost Center**.
- Enter the approved **Request ID** from the Travel Request.

Additional Information

Your company has requested a few more details about this booking.

Speed Chart or Cost Center Number *

10/10

TEST123456

Authorization ID *

0/14

Enter text

How to Booking with Concur

Finalizing Your Trip

- Once all travel arrangements have been reviewed and no additional changes are needed, select **Finalize Trip** to complete the booking.
- If you select **Cancel**, the reservation will not be completed and the booking process will be canceled.
- If you select **Hold Trip**, Concur will save the itinerary without ticketing the airfare. The trip can be finalized later, provided it is completed before the **Airfare Must Be Ticketed By** date and time displayed at the top of the screen.

Estimated Total Cost ⓘ \$1,006.88

Flight ▾ \$1,006.88

Finalize Trip

Cancel Trip

Hold Trip

ⓘ You may hold this reservation until October 8, 2026, 10:00 PM EDT.

Would you like to book anything else?

Add Hotel Add Rental Car

ⓘ Airfare must be ticketed by: 10/09/2026 1:00 AM EDT.

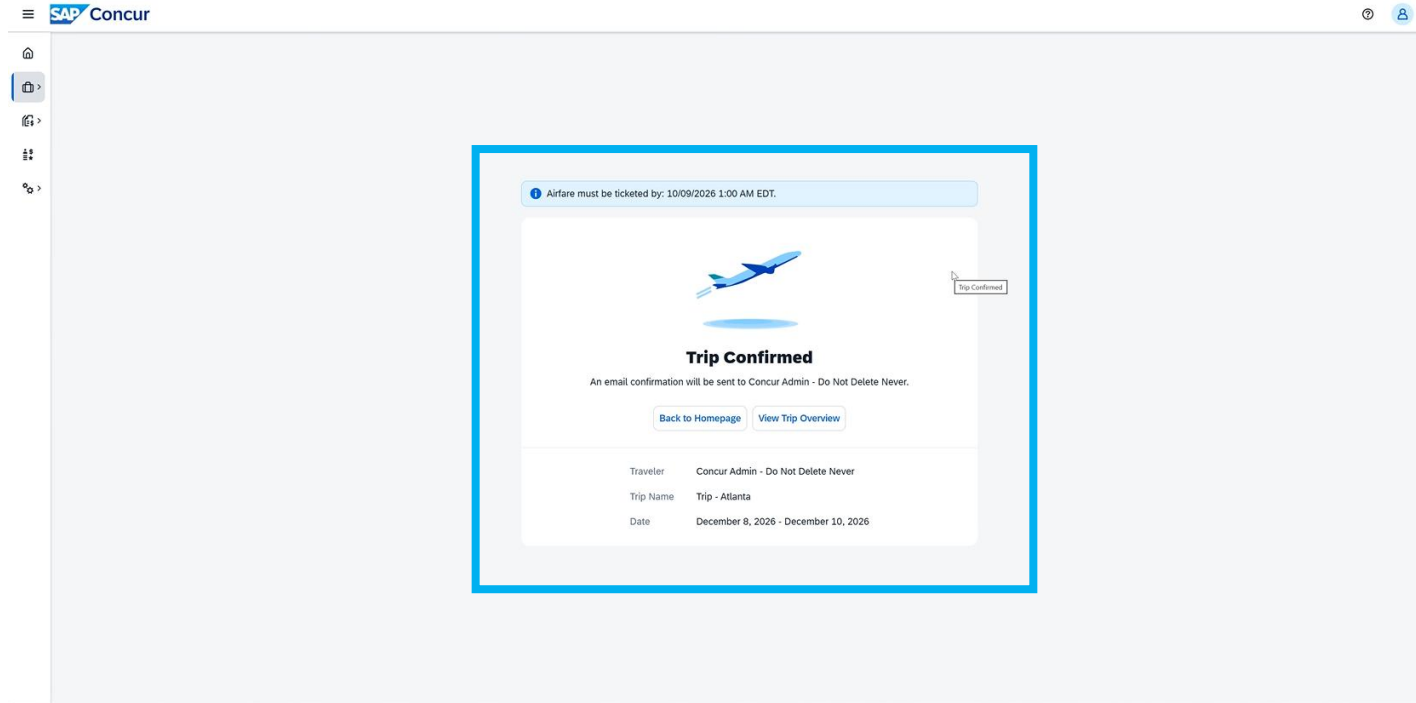
⚠ You have not selected seats for all flights. Select seats or contact the carrier for seat assignment. [Change Seats](#)

Finalize

How to Booking with Concur

Confirmation Screen

- After selecting **Finalize Trip**, Concur displays the **Trip Confirmation** screen



How to Booking with Concur

Trip Overview

The **Trip Overview** page allows travelers to view and manage their reservation after the booking has been completed.

Airfare must be ticketed by: 10/09/2026 1:00 AM EDT.

Trip Overview

Trip Status

Record Locator

Trip Name

Date

Confirmed

GAMRRG

Trip - Atlanta

December 8, 2026 - December 10, 2026

Send Itinerary

Back to Homepage

Change Trip

Edit Details

Cancel Trip

Itinerary

Details

Trip History

✈ El Paso, TX (ELP) - Atlanta, GA (ATL)

Tuesday, December 8, 2026

Confirmation Number: H86YCD

Confirmed

6:00 AM - 10:58 AM Nonstop Duration: 2h 58m

✈ Delta DL 1741

More Preferred Corporate Fare

Payment: Test Corporate Ghost Card ****4444

Flight Fare Rules and Restrictions

Delta Main Classic Cabin: Economy

Select Seats

View Details Change Flight Cancel Flight

✈ Atlanta, GA (ATL) - El Paso, TX (ELP)

Thursday, December 10, 2026

Confirmation Number: H86YCD

Confirmed

11:51 AM - 1:16 PM Nonstop Duration: 3h 25m

✈ Delta DL 1002

More Preferred Corporate Fare

Payment: Test Corporate Ghost Card ****4444

Delta Main Classic Cabin: Economy

Select Seats

Estimated Total Cost ⓘ

\$1,006.88

Flight ▾

\$1,006.88

Rates are quoted in USD.

ⓘ Original cost, refund, or penalty for canceled or changed bookings are not displayed.

Would you like to book anything else?

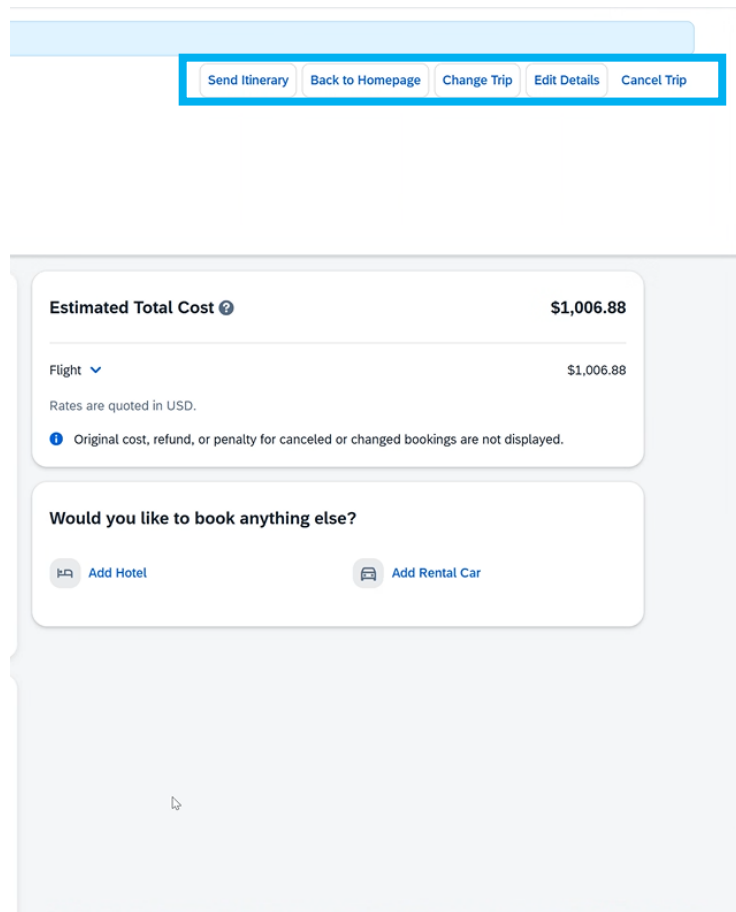
✈ Add Hotel

🚗 Add Rental Car

How to Booking with Concur

Trip Overview

- Review the complete trip itinerary, reservation details, and confirmation numbers.
- Select **Send Itinerary** to email a copy of the itinerary.
- Select **Change Trip** to modify the reservation.
- Select **Edit Details** to update trip information.
- Select **Cancel Trip** to cancel the reservation.



How to Booking with Concur

Trip Overview

- Add a **hotel** or **rental car** to the itinerary, if needed.
- Use the **Trip History** tab to view changes made to the reservation and track trip activity.

Airfare must be ticketed by: 10/09/2026 1:00 AM EDT.

Trip Overview

Send Itinerary

Back to Homepage

Change Trip

Edit Details

Cancel Trip

Trip Status	Record Locator	Trip Name	Date
Confirmed	GAMRRG	Trip - Atlanta	Decemb

Itinerary

Details

Trip History

✈ El Paso, TX (ELP) - Atlanta, GA (ATL)

▼ Tuesday, December 8, 2026

Confirmation Number: H86YCD

6:00 AM - 10:58 AM Nonstop Duration: 2h 58m

✈ Delta DL 1741

More Preferred

Corporate Fare

Payment: Test Corporate Ghost Card ****4444

Flight Fare Rules and Restrictions

Select Seats

Delta Main Classic Cabin: Economy

View Details

Change Flight

Cancel Flight

Estimated Total Cost ⓘ

\$1,006.88

Flight ▼

\$1,006.88

Rates are quoted in USD.

ⓘ Original cost, refund, or penalty for canceled or changed bookings are not displayed.

Would you like to book anything else?

✈ Add Hotel

🚗 Add Rental Car

How to Booking with Concur

How to Cancel a Trip

Step 1: Go to the Trip you want to cancel, Select **Cancel Trip** and confirm the cancellation.

Step 2: Concur processes the cancellation and updates the trip status to **Canceled**.

Step 3: Review the itinerary to verify all reservation segments display a **Canceled** status.

The screenshot illustrates the process of canceling a trip in the Concur system. It is divided into two main sections connected by a large blue downward-pointing arrow.

Top Section: Trip Overview

- A light blue banner at the top states: "Airfare must be ticketed by: 10/09/2026 1:00 AM EDT."
- On the right side, there are five buttons: "Send Itinerary", "Back to Homepage", "Change Trip", "Edit Details", and "Cancel Trip". The "Cancel Trip" button is highlighted with a red rectangle.
- Below the buttons, the "Trip Overview" section displays the following information:

Trip Status	Record Locator	Trip Name	Date
Confirmed	GAMRRG	Trip - Atlanta	December 8, 2026 - December 10, 2026
- At the bottom of this section are three tabs: "Itinerary" (which is selected and underlined), "Details", and "Trip History".

Bottom Section: Confirm Cancellation

- A yellow banner at the top of this section contains a warning icon and the text: "Please check Rate Rules and Restrictions to confirm whether a cancellation fee applies."
- On the right side, there are two buttons: "Confirm Cancel" (highlighted with a red rectangle) and "Do Not Cancel".
- The main content area is titled "Trip - Atlanta" and contains a list of flight segments:
 - El Paso, TX (ELP) - Atlanta, GA (ATL)
 - Atlanta, GA (ATL) - El Paso, TX (ELP)
 - Delta
- Below the flight segments, the "Refund Conditions" are listed: "December 8, 2026 - December 10, 2026 Record Locator: GAMRRG".
- In the bottom right corner of this section, it states: "Cancel now with no penalty".

How to Booking with Concur

How to Cancel a Trip

Step 3: Review the itinerary to verify all reservation segments display a **Canceled** status.

The screenshot displays the SAP Concur interface for a trip overview. At the top, a green banner indicates "Cancellation was successful". The "Trip Overview" section shows a table with columns for Trip Status, Record Locator, Trip Name, and Date. The "Canceled" status is highlighted with a red box. Below the table, the "Details" tab is active, showing two flight segments: "El Paso, TX (ELP) - Atlanta, GA (ATL)" and "Atlanta, GA (ATL) - El Paso, TX (ELP)". Both segments have a "Canceled" status highlighted with a red box. The "Estimated Total Cost" is displayed as \$0.00. A note at the bottom states: "Original cost, refund, or penalty for canceled or changed bookings are not displayed."

SAP Concur

Home

Trip Overview

Send Itinerary Back to Homepage Change Trip

Trip Status	Record Locator	Trip Name	Date
Canceled	GAMRRG	Trip - Atlanta	December 8, 2026 - December 10, 2026

Administration

Details Trip History

El Paso, TX (ELP) - Atlanta, GA (ATL)

Tuesday, December 8, 2026

Confirmation Number: H96YCD

Atlanta, GA (ATL) - El Paso, TX (ELP)

Thursday, December 10, 2026

Confirmation Number: H96YCD

Estimated Total Cost \$0.00

Rates are quoted in USD.

Original cost, refund, or penalty for canceled or changed bookings are not displayed.

Expense Reports

STEP THREE

Creating an Expense Report

Travel and non-travel reimbursement

STEP 1

Start from the Request

Use the approved Travel Request to carry over trip details.

STEP 2

Add Expenses

Scan a receipt, enter manually, or use Available Expenses.

STEP 3

Itemize and Allocate

Itemize by expense type. Allocate by funding source.

STEP 4

Attach Receipts

Attach each receipt to its expense line.

STEP 5

Clear Alerts

Complete missing fields, attach receipts, and justify policy exceptions.

STEP 6

Review and Submit

Review, certify, and submit. Track status in the report timeline.

Travel Request: estimates. Expense Report: actual costs. Reimbursement follows incurred expenses.

Creating an Expense Report

Actual costs, receipts, and reimbursement for travel and non-travel

- **Select** Create Expense Report

The screenshot displays the SAP Concur user interface. At the top left, the SAP Concur logo is visible. The user's name, 'Hello, Brittany', and the date, 'August 20, 2026', are shown in the top right. A sidebar on the left contains navigation icons. The main content area features two prominent buttons: 'Create Request' and 'Create Expense Report'. The 'Create Expense Report' button is highlighted with a red rectangular box. Below these buttons is a section titled 'Company Notes' containing text about traveling internationally and removing campus equipment, with links to 'here' and 'Concur Training Toolkit'. At the bottom, a navigation bar shows tabs for 'Available Expenses (5)', 'Expense Reports (3)', 'Approvals', and 'Requests (6)', each with a '+ See All' link.

SAP Concur

BR

Hello, Brittany
August 20, 2026

Create Request
Start an approval request for travel or expenses.

Create Expense Report
Begin an expense report to track business related expenses.

Company Notes

Traveling International or removing campus equipment?

Please click [here](#) to complete the Export Control Certification form prior to booking your travel.

Need to remove UTEP Equipment from Campus, click [here](#).

[Concur Training Toolkit](#)

[Read More](#)

Available Expenses (5) [See All](#)

Expense Reports (3) [+ See All](#)

Approvals

Requests (6) [+](#)

Creating an Expense Report

Create Expense Report

Create From an Approved Request

Required field *

Policy *	Report/Trip Name *	Report/Trip Start Date	Report/Trip End Date
*T&E Expense Policy		MM/DD/YYYY	MM/DD/YYYY
Traveler Type *	Trip Type *	Report/Trip Purpose *	Does this trip include personal Travel?
Personal Dates of Travel ?	Student Trip ID / Travel Request ID	Additional Information	Business Unit
			(UTEP1) El Paso
Department *	Speedtype *	Fund Code *	Report Total *
Report Number			

Comments To/From Approvers/Processors

Travel Allowance

Please select YES if you are claiming Meal/Incidental and/or lodging on this expense report. This box has 500 characters to communicate with your end users.

- ☐ Yes, I require Travel Allowance
- ☒ No, I do not require Travel Allowance

- **Select** Create From an Approved Request
- **Next** - Click Create from an Approved Request

? Create From an Approved Request?

Creating an expense report from an approved request will discard any information you have already entered in the current window. Are you sure you want to continue?

Create From an Approved Request

Go back

Creating an Expense Report

- **Select** an Available (Approved) Request
- **The Expense Report will auto-populate with expense types from the approved Travel Request.** Users can now add or change information in the prepopulated expense type fields and attached receipts to these expense types.
- Now let's start Adding in Expenses!

Available Requests								
	Request Name↓↑	Request ID↓↑	Start Date↓↑	End Date↓↑	Cancelled↓↑	Request Total↓↑	Approved↓↑	Remain
☐	Mexico Travel	336W	04/29/2026	05/02/2026	No	\$0.00	\$0.00	\$0.00
☐	Canada Group Travel	336X	04/29/2026	05/02/2026	No	\$3,303.24	\$3,303.24	\$3,303.

Creating an Expense Report

No approved Travel Request = Error!

- If you attempt to create an Expense Report **without an approved Travel Request**, you will receive an error message and **will not** be able to continue with or submit the Expense Report.

Report Header

Testing athletics | \$408.50

Alerts: 3

All 1 2

Error: Please attach an approved travel request to the report header then resubmit.

Required field *

Policy *

*Athletics Expense Policy

Report/Trip Name *

Testing athletics

Report/Trip Start Date

09/18/2026

Report/Trip End Date

09/21/2026

Traveler Type *

Employee

Trip Type *

In State

Report/Trip Purpose *

TRV-Recruit Prosp Emp/Student

Does this trip include personal Travel?

No

Personal Dates of Travel ?

Additional Information

0/500

Business Unit

1

(UTEP1) El Paso

Department *

2

(208000) ATHLETICS

Speedtype *

3

(29266110) ATHL-ADMINISTRATIVE AND GENE...

Fund Code *

4

(4100) AUX Intercollegiate Athletics

Report Currency

US, Dollar

Approval Status *

Not Submitted

Report Total *

408.50

Personal Expenses *

0.00

Amount Approved *

408.50

Amount Due Company *

0.00

Amount Due Employee *

408.50

Amount Due Company Card *

0.00

Total Amount Claimed *

408.50

Report Id *

A6AFD01465F54A69A298

Report Number

Save Cancel

Creating an Expense Report – Adding Expenses

Once your expense report is created, there are three options to add expenses.

Choose one of three ways to add an expense:

1. From a Receipt
2. Create an Expense Manually
3. Select from Available Expenses

Expense Testing \$172.00

[View Alerts](#) [Submit Report](#) ...

[Not Submitted](#) Report number: G5AMV1

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (10) View: Standard

☐	Alerts	Date	Receipt	Attributes	Expense Type	Vendor Details	Create Expense from Receipt	Requested	Actions
☐		12/18/2026			TR-Incidentals	Dallas, Texas	Manually Create Expense	\$3.75	...
☐		12/18/2026			TR-Meal Per Diem	Dallas, Texas	Select from Available Expenses (5)	\$36.25	...

Creating an Expense Report - Create Expense from Receipt

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

[View Alerts](#) [Submit Report](#) ...

[Not Submitted](#) Report number: G5AMV1
[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (10) View: Standard									
☐	Alerts $\uparrow\downarrow$	Date $\uparrow\downarrow$	Receipt $\uparrow\downarrow$	Attributes	Expense Type $\uparrow\downarrow$	Vendor Details $\uparrow\downarrow$		Requested $\uparrow\downarrow$	Actions
☐		12/18/2026			TR-Incidentals	Dallas, Texas		\$3.75	...
☐		12/18/2026			TR-Meal Per Diem	Dallas, Texas		\$36.25	...

Option 1:

1. Add an Expense from a Receipt

- Click + Add Expense
- Select Create Expense from Receipt
- Upload your receipt and review the expense details before saving

2. Upload receipt by selecting the file.

Add Expense to Report

[Create Expense from Receipt](#) [Manually Create Expense](#) [Select from Available Expenses \(5\)](#)

Upload Receipt

Upload or drag and drop your receipts here, and we will automatically create expense for you.

[Select File](#)

Creating an Expense Report - Manually Create Expense

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

[View Alerts](#) [Submit Report](#) ...

[Not Submitted](#) Report number: G5AMV1

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (10) View: Standard									
	Alerts ↑↓	Date ↓↑	Receipt ↑↓	Attributes	Expense Type ↑↓	Vendor Details ↑↓		Requested ↑↓	Actions
☐	✖	12/18/2026			TR-Incidentals	Dallas, Texas	1 + Add Expense Create Expense from Receipt Manually Create Expense Select from Available Expenses (5)	\$3.75	...
☐	✖	12/18/2026			TR-Meal Per Diem	Dallas, Texas		\$36.25	...

Option 2:

1. Manually Create Expense

- Click + Add Expense
- Select Manually Create Expense

2. Pick an Expense Type.

2

Add Expense to Report

[+ Create Expense from Receipt](#) [+ Manually Create Expense](#) [Select from Available Expenses \(5\)](#)

Select an expense type for the new expense

Search by expense type, category, description

Recently Used

TR-Lodging

TR-Parking

NT-Fees-Other

NT-Other Expenses

01. Travel Expenses

TR-Lodging

TR-Official Occ/Conf/Busi Mtg

TR-Travel Incidentals

02. Transportation

El Paso Airport Mileage

TR-Airfare

TR-Mileage

TR-Parking

[Collapse All Sections](#)

Once your expense report is created, there are two options to add expenses.

- Complete all required fields.
- Upload the appropriate receipt.
- Review alerts to ensure that all required information and attachments have been provided.
- Missing information and attachments may result in workflow delays.
- Click Save Expense when all fields are completed. This will also clear alerts once the required changes are made.

Creating an Expense Report - Available Expenses

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

Not Submitted

Report number: G5AMV1

View Alerts

Submit Report

...

Report Details Print/Share Manage Receipts Travel Allowance

Expenses (10) View: Standard									
☐	Alerts ↑↓	Date ↓↑	Receipt ↑↓	Attributes	Expense Type ↑↓	Vendor Details ↑↓	Requested ↑↓	Actions	
☐	✖	12/18/2026			TR-Incidentals	Dallas, Texas	\$3.75	...	
☐	✖	12/18/2026			TR-Meal Per Diem	Dallas, Texas	\$36.25	...	

1

Add Expense									
Add Expense Edit Delete Duplicate Allocate Combine Expenses Move									
Create Expense from Receipt									
Manually Create Expense									
Select from Available Expenses (5)									

2

Add Expense to Report							
Create Expense from Receipt Manually Create Expense Select from Available Expenses (5)							
☐	Payment Type ↑↓	Expense Source	Expense Type ↑↓	Vendor Details ↑↓	Date ↓↑	Amount ↑↓	Actions
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	TR-Rental Car	UTEP El Paso, Texas	08/19/2026	\$303.42	...
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	Non Reimbursable/Personal Expense	Sun City Bakery El Paso, Texas	09/18/2025	\$90.59	...

Option 3:

1. Select from Available Expenses (#)

- Click + Add Expense
- Select from Available Expenses

2. Pick from the available expenses listed

- Card Transactions will appear here as well

☐	Travel Cards	Corporate Card	TR-Airfare	LAV (VENEZUELA)	03/19/2026	\$920.69	...
☐	Travel Cards	Corporate Card	Undefined	FOUR SEASONS HOTEL (AUSTRALIA)	03/19/2026	\$932.77	...

Adding A Non-Expense Into A Travel Expense Report

- Select '+ Add Expense'

[Expense Reports](#)

testing incidentals \$415.50

Not Submitted

Report number: GZV6AK

Report Details

Print/Share

Manage Receipts

Travel Allowance

View Alerts

Submit Report

Expenses (4) | View: Standard

+ Add Expense

Edit

Delete

Duplicate

Allocate

Combine Expenses

Move

☐	Alerts $\updownarrow$	Date $\updownarrow$	Comment $\updownarrow$	Receipt $\updownarrow$	Attributes	Expense Type $\updownarrow$	Vendor Details $\updownarrow$	Payment Type $\updownarrow$	Amount $\updownarrow$	Requested $\updownarrow$	Actions
☐		09/09/2026				TR-Lodging	Hilton Hotels Houston, Texas	Out of Pocket	\$178.00	\$228.00	
☐		09/09/2026				TR-Meal Per Diem	Houston, Texas	Out of Pocket	\$56.25	\$56.25	
☐		09/08/2026				TR-Meal Per Diem	Houston, Texas	Out of Pocket	\$75.00	\$75.00	
☐		09/07/2026				TR-Meal Per Diem	Houston, Texas	Out of Pocket	\$56.25	\$56.25	
									\$415.50	\$415.50	

Adding A Non – Travel Expense Into A Travel Expense Report

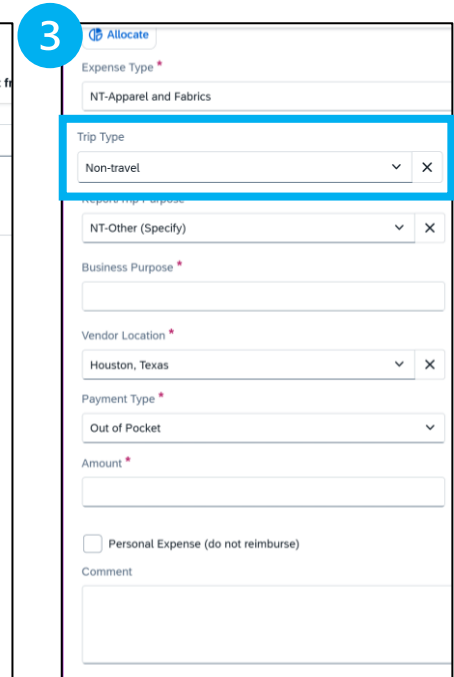
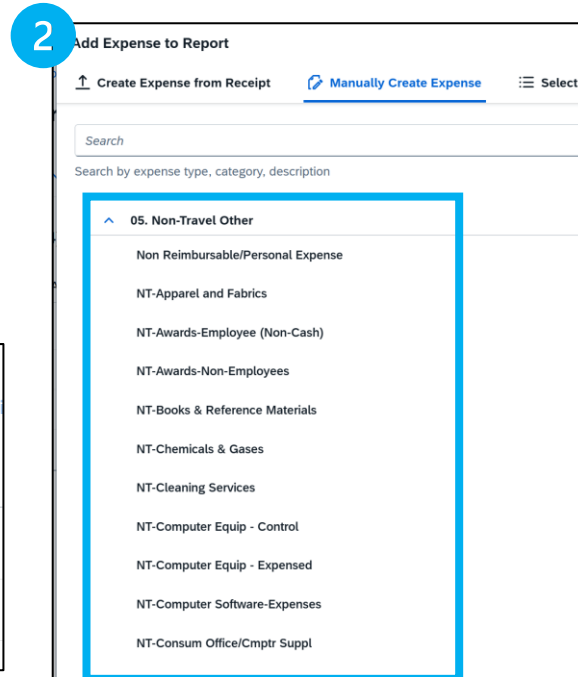
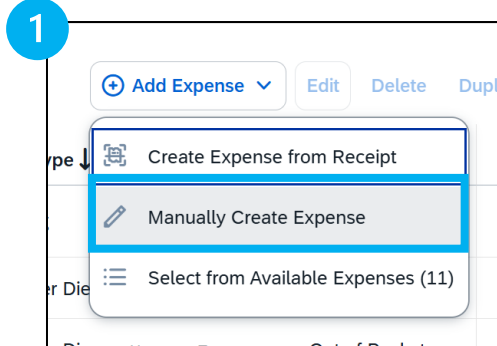
Step 1: Choose Manually Create Expense

From the dropdown options, select **Manually Create Expense**.

Step 2: Select the Appropriate Non-Travel Expense Type

Under the **Non-Travel Other** category, choose the expense type that best matches your purchase.

Step 3: Before entering your expense details, update the **Trip Type** field to **Non-Travel**. This indicates that the expense is a **non-travel transaction** and ensures the report is categorized correctly.



Creating an Expense Report - Alerts

Fix the Errors

Review Alerts

- Check for alerts before submitting your Expense Report.
- Click the **red X alert icon** to view and resolve specific issues.
- Select **View Alerts** to see a summary of all alerts in the report.
- Missing information or attachments may delay processing

Expense Testing \$535.42

Not Submitted Report number: G5AMV1

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (13)

View: Standard

[Add Expense](#)

[Edit](#)

☐	Alerts 	Date 	Receipt 	Attributes	Expense Type 	Vendor Details 	Payment Type 		
☐		12/18/2026			TR-Incidentals	Dallas, Texas	Out of Pocket		
☐		12/18/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket		
☐		12/17/2026			TR-Incidentals	Dallas, Texas	Out of Pocket		
☐		12/17/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket		
☐		12/16/2026			TR-Transportation	Uber Augusta, Georgia	Out of Pocket		
☐		12/16/2026			TR-Incidentals	Dallas, Texas	Out of Pocket		
☐		12/16/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$22.00	...

[View Alerts](#)

[Submit Report](#)

[...](#)

Alerts

All  12  3

Expense - TR-Meal Per Diem - \$36.25

 **Error:** Missing required field: Business Purpose.
[View](#)

Expense - TR-Incidentals - \$3.75

 **Error:** Missing required field: Business Purpose.
[View](#)

Expense - TR-Meal Per Diem - \$55.00

 **Error:** Missing required field: Business Purpose.
[View](#)

Creating an Expense Report – How to Fix Alerts

Fix the Errors

Review Alerts

- Open the expense report that contains the error(s).
- Once the report is open, there are **two ways to view your alerts**:
 - Select the **red X icon** next to the expense entry.
 - Select the **View Alerts button** in the upper-right corner of the report.
- A list of alerts will appear, showing any errors or warnings that need attention.
- Select **View** next to an alert to navigate directly to the issue and make the necessary correction.

SAP Concur

< Expense Reports

Britt's Office Purchase (MD) \$155.53

Not Submitted Report number: 4YFYKN

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

View Alerts Submit Report ...

Expenses (2) View: Standard ▾

⊕ Add Expense ▾ Edit Delete Duplicate Allocate Combine Expenses Move ▾ ⬇

☐	Alerts ↑	Date ↓	Receipt ↑	Attributes	Expense Type ↑	Vendor Details ↓	Payment Type ↓	Requested ↓	Actions
☐		08/27/2026			NT-Hardware & Materials	El Paso, Texas	Out of Pocket	\$79.00	...
☐	Alerts				NT-Other Expenses	Mesa Office Supply Mesa, Arkansas	Out of Pocket	\$76.53	...
								\$155.53	

Error: Missing required field: Business Purpose, Enter Vendor Name. View

Creating an Expense Report - How to Fix Alerts

Fix the Errors

The screenshot shows the SAP Concur interface for creating an expense report. The main header displays the SAP Concur logo and a navigation menu. The breadcrumb trail indicates the current path: < Britt's Office Purchase (MD). The report title is "NT-Hardware & Materials \$79.00". Below the title, there are buttons for "View Alerts", "Save Expense", and a dropdown menu. The "Alerts" modal is open, displaying the message: "Error: Missing required field: Business Purpose, Enter Vendor Name." The form fields include: Expense Type (NT-Hardware & Materials), Trip Type (Non-travel), Traveler Type (Employee), Report/Trip Purpose (NT-Other (Specify)), Transaction Date (08/27/2026), Business Purpose (highlighted in red), Vendor Name (highlighted in red), Vendor Location, and Payment Type. The right sidebar shows a receipt preview for "OFFICE SUPPLIES DEMO STORE" with a table of items and amounts.

ITEM	QTY	AMOUNT
Utility Knife Set	1	\$24.99
Precision Screwdriver Set	1	\$19.99
25 ft Measuring Tape	1	\$14.99
Adjustable Wrench	1	\$12.99
Protective Safety Glasses	1	\$6.04
Subtotal		\$79.00

- Selecting **View** will take you directly to the expense entry that requires attention.
- The expense details page will display the alerts and identify the fields that need to be completed or corrected.
- In this example, the required fields are **Business Purpose** and **Vendor Name**.
- After updating the required information, select **Save Expense**.
- Once the expense is saved, the alerts will clear automatically.

Creating an Expense Report – Adding Expense Itemizations

Split one transaction into multiple expense types (account codes).

Itemized your expenses

- Click on the expense you need to itemize, in this example I will do my lodging.

 BR

[Expense Reports](#)

Expense Testing \$535.42 View Alerts Submit Report ...

Not Submitted Report number: GSAMV1

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (13) View: Standard

☐	Alerts 	Date 						
☐		12/18/2026		TR-Lodging	Sheraton Dallas, Texas	Out of Pocket	\$1,259.00	...
☒		12/18/2026		TR-Incidentals	Dallas, Texas	Out of Pocket	\$3.75	...
☐		12/18/2026		TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$36.25	...
☐		12/17/2026		TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...
☐		12/17/2026		TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$55.00	...
☐		12/16/2026		TR-Transportation	Uber Augusta, Georgia	Out of Pocket	\$50.00	...
☐		12/16/2026		TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...

Lodging transactions must be itemized but any other transactions may also be itemized to split between two or more expense types (account codes).

Creating an Expense Report – Adding Expense Itemizations

Split one transaction into multiple expense types (account codes).

Itemize Your Expenses

- Click on Itemization

Expense Testing

TR-Lodging \$1,259.00

DetailsItemizations

Required field *

Expense Type *

TR-Lodging

Trip Type

In State

Traveler Type

Employee

Report/Trip Purpose

TRV-Attend Meeting, Conf, etc.

Date Range *

12/14/2026 - 12/18/2026

Nights:

4

Transaction Date *

08/24/2026

Business Purpose

Vendor *

Sheraton

Vendor Location *

Dallas, Texas

Payment Type *

Out of Pocket

Amount *

Currency *

View Alerts

Save Expense

Receipt

0A0FBABA61... 1 / 1 - 50% +

1

DEMO HOTEL FOLIO

Sheraton Hotel

Guest Name: Brittany Ramirez

Confirmation #: 87464219

Room Type: Standard King

Travel Purpose: Conference / Business Travel Demo

Check-In: August 24, 2026

Check-Out: August 28, 2026

Nights: 4

Folio Date: August 28, 2026

Itemized Charges

Date	Description	Amount
Aug 24, 2026	Room Charge	\$275.00
Aug 24, 2026	Hotel Taxes & Fees	\$19.75
Aug 25, 2026	Room Charge	\$275.00
Aug 25, 2026	Hotel Taxes & Fees	\$19.75
Aug 26, 2026	Room Charge	\$275.00
Aug 26, 2026	Hotel Taxes & Fees	\$19.75
Aug 27, 2026	Room Charge	\$275.00
Aug 27, 2026	Hotel Taxes & Fees	\$19.75
Subtotal: Lodging		\$1,100.00
Taxes & Fees		\$159.00
Other Charges		\$5.00
Total Amount Paid		\$1,259.00

Payment Method: Visa ending in 1234

Payment Status: Paid in Full - Demo Only

Creating an Expense Report – Adding Expense Itemizations

Split one transaction into multiple expense types (account codes).

Itemize Your Expenses

- This is the how it looks when you add in the itemizations.
- Click 'Save Expense'

≡

SAP Concur

< Expense Testing

12 of 14

View Alerts

Save Expense

TR-Lodging \$1,259.00

DetailsItemizations

Amount
\$1,259.00

Itemized
\$1,259.00

Remaining
\$0.00

Itemizations (8)

Expense Type

↑↓

Date

↑=

Requested Amount

↑↓

Actions

⋮

TR-Lodging

12/14/2026

\$275.00

⋮

TR-Lodging - Tax

12/14/2026

\$39.75

⋮

TR-Lodging

12/15/2026

\$275.00

⋮

TR-Lodging - Tax

12/15/2026

\$39.75

⋮

TR-Lodging

12/16/2026

\$275.00

⋮

TR-Lodging - Tax

12/16/2026

\$39.75

⋮

Add Itemization

Edit

Delete

Duplicate

Allocate

Receipt

Hide Receipt Viewer

F7E90A3...1 / 150%

1

50%

DEMO HOTEL FOLIO

Sample Hotel Folio - Demo Purpose Only

NOT A VALID RECEIPT - FOR CONCUR TRAINING DEMO ONLY

Guest Name

Brittany Ramirez

Confirmation #

01430219

Room Type

Standard King

Travel Purpose

Conference / Business Travel Demo

Check-In

December 14, 2026

Check-Out

December 16, 2026

Nights

4

Folio Date

December 16, 2026

Itemized Charges

Date	Description	Amount
Dec 14, 2026	Room Charge	\$275.00
Dec 14, 2026	Hotel Taxes & Fees	\$39.75
Dec 15, 2026	Room Charge	\$275.00
Dec 15, 2026	Hotel Taxes & Fees	\$39.75
Dec 16, 2026	Room Charge	\$275.00
Dec 16, 2026	Hotel Taxes & Fees	\$39.75
Dec 17, 2026	Room Charge	\$275.00
Dec 17, 2026	Hotel Taxes & Fees	\$39.75
Subtotal: Lodging		\$1,100.00
Taxes & Fees		\$158.00
Other Charges		\$0.00
Total Amount Paid		\$1,259.00

Payment Method

Visa ending in 1234

Payment Status

Paid in Full - Demo Only

DEMO HOTEL FOLIO

Sample Hotel Folio - Demo Purpose Only

NOT A VALID RECEIPT - FOR CONCUR TRAINING DEMO ONLY

Creating an Expense Report – Adding Allocations

Splitting across funding sources

Allocations

- Select an expense
- Click on 'Allocate'



[Expense Reports](#)

Expense Testing \$1,794.42

 View Alerts  Submit Report ...

Not Submitted

Report number: G5AMV1

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

Expenses (14)

View: Standard

 Add Expense  Edit  Delete  Duplicate  Allocate  Combine Expenses  Move  Download

	Alerts 	Date 	Receipt 	Attributes	Expense Type 	Vendor Details 	Payment Type 	Requested 	Actions
☐		12/18/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$3.75	...
☐		12/18/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$36.25	...
☐		12/17/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...
☐		12/17/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$55.00	...
☒		12/16/2026			TR-Transportation	Uber Augusta, Georgia	Out of Pocket	\$50.00	...
☐		12/16/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...

Creating an Expense Report – Adding Allocations

Splitting across funding sources

1. Choose how you want to split the expense

- Select **Percent** if you want to divide the expense by percentages (for example, 50% / 50%).
- Select **Amount** if you want to divide the expense using specific dollar amounts (for example, \$25 / \$25).

2. Review the current funding source

- Under Code, you'll see the funding source currently assigned to the expense.
- In this example, **UTEP1-301100-19021300-3105** is the primary funding source.
- Because it shows **100%**, the entire expense is currently being charged to that funding source.

3. Add additional allocations

- In the **Allocations** section, click **Add**.
- This allows you to add another funding source and split the expense across multiple accounts.

The screenshot shows the 'Allocate' interface with the following elements:

- Header:** 'Allocate' title and 'Expenses: 1 | \$50.00'.
- Step 1:** Two buttons, 'Percent' and 'Amount', are shown. The 'Percent' button is highlighted with a blue circle and the number 1.
- Summary:** A table-like section showing 'Amount \$50.00', 'Allocated \$50.00', '100%', 'Remaining \$0.00', and '0%'.
- Step 2:** A table with 'Code' and 'Percent %' columns. The code 'UTEP1-301100-19021300-3105' is listed with a value of '100'. This row is highlighted with a blue circle and the number 2.
- Step 3:** An 'Allocations (0)' section at the bottom with buttons for 'Add', 'Edit', 'Remove', and 'Save as Favorite'. This section is highlighted with a blue circle and the number 3.

Creating an Expense Report – Adding Allocations

Splitting across funding sources

- **Add** in another funding source until the expense has been allocated as needed.

The screenshot displays the 'Allocate' interface for an expense report. At the top, it shows 'Expenses: 1' and '\$50.00'. Below this, there are tabs for 'Percent' (selected) and 'Amount'. The main area shows 'Amount \$50.00', 'Allocated \$50.00 100%', and 'Remaining \$0.00 0%'. A 'Default Allocation' section shows 'Code UTEP1-301100-19021300-3105'. A modal titled 'Add Allocation' is open, showing fields for 'Business Unit' (UTEP1 El Paso), 'Department' ((301100) Budget and Payroll Svcs), 'Speedtype' ((19021300) Budget & Payroll Svcs), and 'Fund Code' ((3105) DES Designated Tuition). The modal has 'Save' and 'Cancel' buttons. On the right, there are buttons for 'Add', 'Edit', 'Remove', and 'Save as Favorite'.

Allocate

Expenses: 1 | \$50.00

Percent | Amount

Amount
\$50.00

Allocated \$50.00
100%

Remaining \$0.00
0%

Default Allocation

Code
UTEP1-301100-19021300-3105

Allocations (0)

Add Allocation

+ New Allocation ★ Favorite Allocations

Business Unit * 1
(UTEP1) El Paso

Department * 2
(301100) Budget and Payroll Svcs

Speedtype * 3
(19021300) Budget & Payroll Svcs

Fund Code * 4
(3105) DES Designated Tuition

Save Cancel

Percent %
100

Add Edit Remove Save as Favorite

Creating an Expense Report – Adding Allocations

Splitting across funding sources

- **Enter the allocation amounts or percentages**
 - Enter the percentage or dollar amount for each funding source.
 - As allocations are added, the original funding source percentage or amount will adjust accordingly.
- **Verify the allocation**
 - Confirm the Remaining Amount displays \$0.00 and 0% before saving.
 - This indicates the full expense has been allocated across all funding sources.

Allocate

Expenses: 1 | \$50.00 | [View Allocation Group](#)

Percent

Amount

Amount
\$50.00

Allocated \$50.00
100%

Remaining \$0.00
0%

Default Allocation

Code
UTEP1-301100-19021300-3105

Percent %
0

Allocations (1) [Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

☐	Business Unit↑	Department↑	Speedtype↑	Fund Code↑	Code↑	Percent %	
☐	El Paso	Budget and Payroll Svcs	Budget & Payroll Svcs	DES Designated Tuition	UTEP1-301100-19021300-3105	100	...

Creating an Expense Report – Adding Allocations

Splitting across funding sources

- **Example: 50/50 Split**
 - In this example, the \$50 expense is split evenly between two funding sources.
 - The original funding source is charged **50% (\$25)**.
 - The newly added funding source is charged **50% (\$25)**.
 - Once the allocation is complete, the **Remaining Amount** should display **\$0.00 and 0%**.

Allocate

Expenses: 1 | \$50.00 | [View Allocation Group](#)

Percent

Amount

Amount

\$50.00

Allocated \$50.00

100%

Remaining \$0.00

0%

Default Allocation

Code

UTEP1-301100-19021300-3105

Allocations (1)

Add

Edit

Remove

Save as Favorite

☐	Business Unit↑↓	Department↑↓	Speedtype↑↓	Fund Code↑↓	Code↑≡	Percent %
☐	El Paso	Budget and Payroll Svcs	Budget & Payroll Svcs	DES Designated Tuition	UTEP1-301100-19021300-3105	50 ...

Creating an Expense Report – Adding Allocations

Splitting across funding sources

- Back on the main Expense Report screen, you'll see an allocation icon in the Attributes column.
 - This icon indicates that the expense has been **allocated across multiple funding sources**.
 - If the icon is present, the expense is not being charged to a single funding source.
 - You can select the expense and click **Allocate** to review or modify the allocation details.

 BR

< Expense Reports

Expense Testing \$1,794.42 View Alerts Submit Report ...

Not Submitted Report number: G5AMV1

Report Details Print/Share Manage Receipts Travel Allowance

Expenses (14) View: Standard Add Expense Edit Delete Duplicate Allocate Combine Expenses Move ↓

☐	Alerts ↓↑	Date ↓↑	Receipt ↓↑	Attributes	Expense Type ↓↑	Vendor Details ↓↑	Payment Type ↓↑	Requested ↓↑	Actions
☐	✖	12/18/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$3.75	...
☐	✖	12/18/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$36.25	...
☐	✖	12/17/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...
☐	✖	12/17/2026			TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$55.00	...
☒		12/16/2026			TR-Transportation	Uber Augusta, Georgia	Out of Pocket	\$50.00	...
☐	✖	12/16/2026			TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...

Creating an Expense Report – Missing Receipt Declaration

Lost Receipt?

- **Lost a receipt? Concur allows you to submit a Missing Receipt Declaration for eligible expenses charged to a cost center.**
 1. Select the expense that you do not have the receipt for
 2. Click **Manage Receipts**
 3. Select **Missing Receipt Declaration**

SAP Concur

< Expense Reports

Expense Testing \$1,871.42 View Alerts Submit Report

Not Submitted Manage Receipts Travel Allowance

Report Details

Expenses (15) View: Standard

View Available Receipts
Manage Attachments
View Receipts in New Window
Missing Receipt Declaration

	Alerts	Receipt	Attributes	Expense Type	Vendor Details	Payment Type	Requested	Actions
☐				TR-Transportation	Uber Augusta, Georgia	Out of Pocket	\$50.00	...
☐				TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...
☐				TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$22.00	...
☐				TR-Incidentals	Dallas, Texas	Out of Pocket	\$5.00	...
☐				TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$33.00	...
☐				TR-Incidentals	Dallas, Texas	Out of Pocket	\$3.75	...
☐				TR-Meal Per Diem	Dallas, Texas	Out of Pocket	\$3.25	...
☒				TR-Transportation	Uber Augusta, Georgia	Out of Pocket	\$77.00	...
☐				TR-Incidentals	Sheraton	Out of Pocket	\$1,259.00	...

Creating an Expense Report – Missing Receipt Declaration

Lost Receipt?

1. **Select the expense** for which you do not have a receipt.
2. Click **Accept & Create** to generate the Missing Receipt Declaration.
3. The Missing Receipt Declaration will automatically be attached to the selected expense in your expense report.
 - To view the declaration, select the expense and it opens in the Receipt Viewer.

Create Receipt Declaration

A receipt is required for this expense. If you are missing your receipt please use this missing receipt affidavit.

To create a Missing Receipt Declaration, select the expenses below that require a receipt.

☐	Expense Type ↓↑	Vendor ↓↑	Date ↓↑	Amount ↓↑
☒	TR-Transportation	Uber	09/02/2026	\$77.00

i Acceptance: I certify that I lost my receipt and this is a valid business expense.

2 **Accept & Create** Cancel

< Expense Testing

TR-Transportation \$77.00

Details

Itemizations

Allocate

Expense Type *

TR-Transportation

Trip Type

In State

Report/Trip Purpose

TRV-Attend Meeting, Conf, etc.

Business Purpose *

Conference

Traveler Type

Employee

Transaction Date *

09/02/2026

Enter Vendor Name *

Uber

View Alerts

Save Expense | v

...

Receipt

Hide Receipt Viewer

78731F8... 1 / 1 - 50% +

Missing Receipt Declaration - TR-Transportation

Date of Expense: 9/2/26
Vendor: Uber
Amount: 77.00 USD
City: Augusta, Georgia
Business Reason: Conference

Acceptance: I certify that I lost my receipt and this is a valid business expense.
Brittany Ramirez
9/26/26
15:22 Greenwich Mean Time

Creating an Expense Report – Review & Notify Traveler for Submission

Notify Your Traveler

- Once you have uploaded all receipts, resolved any alerts, completed itemizations, and entered any required allocations, your report is ready for submission.
- Select **Notify Employee**, this will send them an email that they need to go in and submit the report.

Traveler's POV

- When they receive the email and go to the expense report and click **Submit Report** the **Report Totals** window will appear. They will review the summary and select **Submit Report** again to continue.
- The **User Electronic Agreement** will then display.
- They will review the agreement and select **Accept & Continue** to complete the submission process.

The screenshot displays the SAP Concur Expense Reports interface. At the top, a blue banner indicates a budget check exception: "Available funds exceeded. Current Available Balance = -10266.18 and Expense amount for this Budget is: 76.53, Line: 2, Split: 1 - .Budget Check Exception: OPE.SpeedType = 19021300, Account = 63204, Available funds". A "Submit Report" button is visible in the top right corner.

The "Report Totals" window is open, showing the following summary:

Report Totals		
Company Payments \$155.53 Employee		
Employee Payments \$0.00 Company		
Amount Total: \$155.53	Due Employee: \$155.53	Owed Company: \$0.00
Requested Amount: \$155.53	Total Paid By Company: \$155.53	Total Owed By Employee: \$0.00

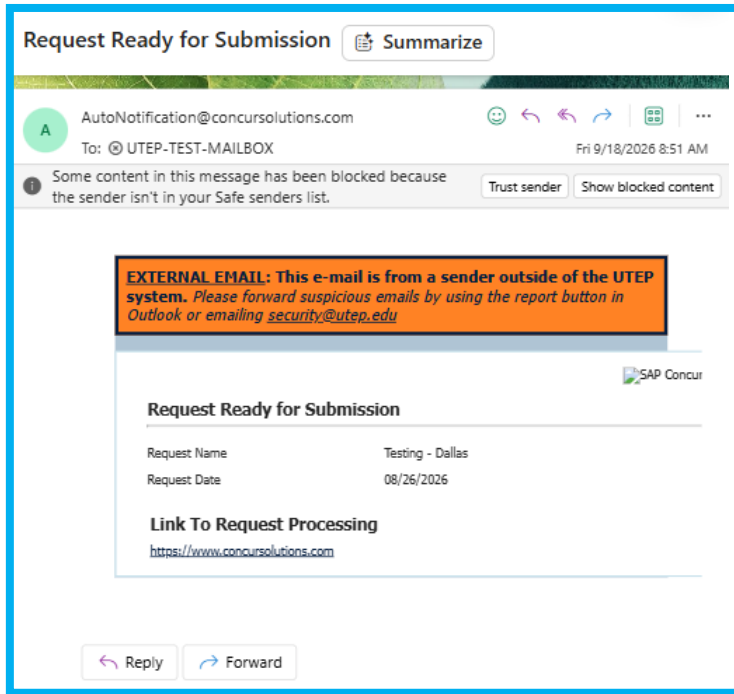
At the bottom of the window, there are "Submit Report" and "Cancel" buttons.

In the background, a table of expense items is partially visible:

	Requested ↑↓	Actions
	\$79.00	...
	\$76.53	...
	\$155.53	

Traveler's Email to Submit Travel Request

Traveler receives this notification via email



Traveler's POV: Review & Submit

Traveler click link on email and it takes them to the expense report, the can review and submit report.

[Expense Reports](#)

Testing athletics \$408.50

Not Submitted

Report number: V2910Y

[Report Details](#) [Print/Share](#) [Manage Receipts](#)

Submit Report

Expenses (2)		View: Standard						Add Expense		Edit	Delete	Duplicate	Allocate	Combine Expenses	Move	Download
☐	Date ↓↑	Receipt ↑↑	Attributes	Expense Type ↓↑	Vendor Details ↓↑	Payment Type ↓↑	Requested ↓↑	Actions								
☐	09/19/2026			Car Rental	ENTERPRISE CAR RENTAL Austin, Texas	Out of Pocket	\$400.00	...								
☐	09/18/2026			Parking	DOWNTOWN PARKING Austin, Texas	Out of Pocket	\$8.50	...								
							\$408.50									

Traveler's POV: Review & Submit

- The User **Electronic Agreement** will appear after they submit the report.
- They will review the agreement and select **Accept & Continue**.
- The report will then be successfully submitted and routed through the approval process.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Accept & Continue Cancel

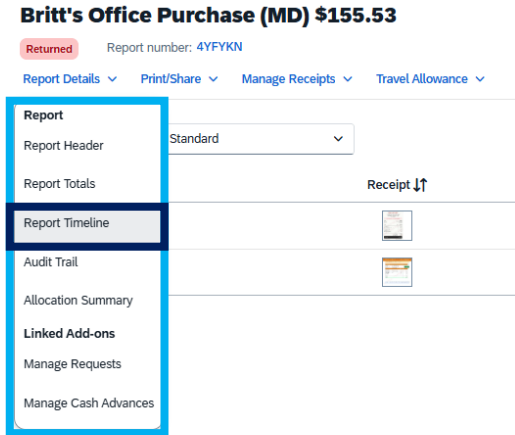
Report Status

 **Report Submitted**

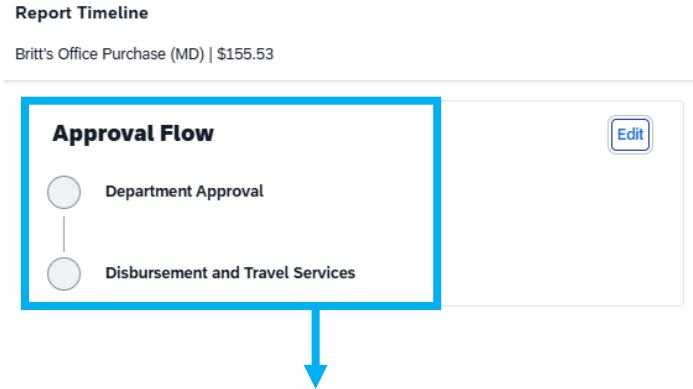
Britt's Office Purchase (MD) | \$155.53

Close

Expense Report - How to check the status



- Within the Expense Report, navigate to the **Request Details** link directly below the Request name.
- Select **Report Timeline** from the drop-down menu.



Icon Indicator meaning:

- **Pending approval** step will display a blue clock icon
- **Approved approval** step(s) will display a circle with a blue checkmark
- **Future pending approval** step(s) will display an empty circle.

Expense Report –

How to check audit trail & payment information

- Within the Expense Report, navigate to the **Request Details** link directly below the Request name.
- Select **Audit Trail** from the drop-down menu.

Britt's Office Purchase (MD) \$155.53

Not Submitted

Report number: V2910Y

Report Details ▾

Print/Share ▾

Manage Receipts ▾

Report

Report Header

Report Totals

Report Timeline

Audit Trail

Allocation Summary

Linked Add-ons

Manage Requests

Standard ▾

Receipt ↓↑



Expense Report –

How to check audit trail & payment information

Audit Trail

Travel Card Test | \$79.17

Report Level

Date/Time ↓↑	Updated By ↓↑	Action ↓↑	Description ↓↑
09/17/2026 11:09 AM	Concur System	Expense Report Payment Confirmation	Received Payment: EFT Transaction Number: 2100846569 Amount: 79.17 USD Paid To:
09/15/2026 10:56 AM	Concur System	Email Sent.	Employee notified of report status change:
09/15/2026 10:56 AM	FI Service	Posting Feedback Received	Posting Successful. Company ID: 7ba3c288-cfba-48c4-ac17-b3ff4c96e395 Document Number: 0 Posting Date: 2026-09-15
09/15/2026 10:48 AM	Concur System	Email Sent.	Employee notified of report status change:
			Status changed from Pending External Validation to

Entry Level

Date/Time ↓↑	Updated By ↓↑	Action ↓↑	Description ↓↑
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Non – Travel Expense Report

Creating a Non – Travel Expense Report

Actual costs, receipts, and reimbursement for travel and non-travel

- **Select** Create Expense Report

The screenshot displays the SAP Concur user interface. At the top left, the SAP Concur logo is visible. The user's name, 'Hello, Brittany', and the date, 'August 20, 2026', are shown in the top right. A sidebar on the left contains navigation icons. The main content area features two prominent buttons: 'Create Request' and 'Create Expense Report'. The 'Create Expense Report' button is highlighted with a red rectangular border. Below these buttons is a 'Company Notes' section containing text about international travel and equipment removal, with links to 'here' and a 'Concur Training Toolkit' link. At the bottom, a navigation bar shows tabs for 'Available Expenses (5)', 'Expense Reports (3)', 'Approvals', and 'Requests (6)', each with a '+ See All' link.

SAP Concur

BR

Hello, Brittany
August 20, 2026

Create Request
Start an approval request for travel or expenses.

Create Expense Report
Begin an expense report to track business related expenses.

Company Notes

Traveling International or removing campus equipment?

Please click [here](#) to complete the Export Control Certification form prior to booking your travel.

Need to remove UTEP Equipment from Campus, click [here](#).

[Concur Training Toolkit](#)

[Read More](#)

Available Expenses (5) [See All](#) Expense Reports (3) [+ See All](#) Approvals Requests (6) [+](#)

Creating a Non – Travel Expense Report

- Complete the required header fields.
- **Important:** For **Trip Type**, select **Non-Travel**.
- Once all required fields are complete, click **Create Report**.
- **Complete and Submit**

Add your expenses, review any alerts or exceptions, complete itemizations and allocations if needed, attach any required documentation, and submit the report once everything has been reviewed and validated.

The screenshot shows the 'Create Expense Report' form. The 'Trip Type' dropdown menu is highlighted with a blue box, and 'Non-travel' is selected. The form includes various required fields marked with an asterisk (*). At the bottom right, there are 'Create Report' and 'Cancel' buttons.

Create Expense Report

[Create From an Approved Request](#)

Required field *

Policy * Report/Trip Name * Report/Trip Start Date Report/Trip End Date

*T&E Expense Policy MM/DD/YYYY MM/DD/YYYY

Traveler Type * Trip Type * Report/Trip Purpose * Does this trip include personal Travel?

Non-travel

Personal Dates of Travel ? Student Trip ID Travel Request ID Additional Information 0/500 Business Unit 1

(UTEPI) El Paso

Department * 2 Speedtype * 3 Fund Code * 4 Report Total *

Report Number

Comments To/From Approvers/Processors 0/500

Travel Allowance

A Travel Allowance is required whenever an expense report includes lodging and/or meal per diem expenses.

Create Report Cancel

Live Demo

Break for 10 mins

Hands on Training - Expense Report

Your turn — reconcile the trip you requested earlier

Practice scenario

Your Chicago trip is complete. The hotel folio includes room, tax, and a parking charge, and you have added mileage to the airport.

Build an Expense Report that includes:

- A link to the approved Travel Request
- Available expenses imported and coded
- An itemized lodging charge
- Mileage entered with start and end addresses
- Receipts attached to the correct lines

Try these variations

Split the funding

Allocate one expense across two SpeedTypes

Lose a receipt

Use a Missing Receipt Declaration on an item over \$50

Exceed a limit

Enter a justification when an audit rule fires

Track it

Find the report timeline and approval history

On a project or grant, receipts are required for every expense regardless of amount, and a Missing Receipt Declaration cannot be used.

Mobile App

Mobile Application – download

SAP Concur

 App Store

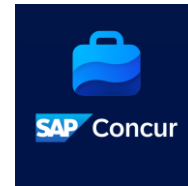


 Google Play



What the Mobile App Can Do

Review, submit, capture, approve, and book—on the go.



Review & submit

Review and submit travel requests and expense reports.

Capture & upload receipts

Photograph receipts or upload photos and files.

Approve on the move

Approvers can view pending items and approve in the app.

Book travel

Book flights, hotels, and rental cars from your phone.

Special Travel Scenarios

Four situations that behave a little differently

01

International Travel

Currency conversion and per diem rates are built in — no separate OANDA attachment, and trips can be booked in Concur.

International travel may require additional approvals and reviews, including Export Control and, in some cases, IOC approval.

02

Washington DC Travel

The DC travel notification requirement has not changed. In Concur it appears as an alert with the contact and the form. The alert will not block you from continuing.

03

Student Travel

The Student Affairs approval process is not changing and Student Travel Registry requirements still apply. Enter the Trip ID on the request and report instead of attaching the approval separately.

04

Group Travel

Select the Group traveler type on the request header so the trip is set up correctly from the start, then coordinate documentation for the travelers included.

Questions about student pre-travel approval still go to Student Affairs.

What Happens After Submission?

The three questions users always ask

Where is my report?

The document timeline shows every step and who currently holds it.

Has it been approved?

Approval history lists each approver, the action taken, and the date.

Why was it returned?

The approver's comment travels with the document so you know exactly what to fix.

One answers to all three — the Report Timeline, Audit Trail, and Detail Report

Open Report Details > Report Timeline and Audit Trail to see every step, who holds the document now, each approval action and date, and any returned-with-comment. The same timeline and trail exists for both Expense Reports and Travel Requests.

Open Print/Share > Detailed Report and scroll down to the audit Trail section to see every step, who holds the document now, each approval action and date, and any returned-with-comment

Set the right expectation

Approved does not mean paid — approved reports flow to PeopleSoft automatically and then wait for the pay cycle.

Why was it returned?

Multiple areas to navigate to look for status updates and comments

Audit Trail

Open Report Details > Audit Trail to see every step, who holds the document now, each approval action and date, and any returned-with-comment.

Request Timeline

Open Report Details > Report Timeline to see every step, who holds the document now, each approval action and date, and any returned-with-comment.

Audit Trail			
Cash Advance MPD w/o Allowance \$110.00			
Request Level			
Date/Time↕↗	Updated By↕↑	Action↕↑	Description↕↑
10/01/2026 11:55 AM	Gaby Test	Approval Status Change	Status changed from Submitted and Pending Athletics Approval to Sent Back to Employee Comment: Sending back this cash advance travel request to test department approver sent back comments Step Name: Athletics Approver (Danny)

Request Timeline

Cash Advance MPD w/o Allowance | \$110.00

Approval Flow

Budget PreValidation

Athletics Approver (Danny)

Executive Approval

Cash Advance Approver

Budget Post Validation

Request Summary

Sort

Filter

Request Comment

0/500

Thursday, October 1, 2026

Status: Sent Back to Employee

Status Updated: Gaby Test

Oct 1, 2026 1:55 PM

Comment

Gaby Test Oct 1, 2026 1:55 PM

Sending back this cash advance travel request to test department approver sent back comments

Friday, September 18, 2026

Status: Approved

Status Updated: Concur System

Sep 18, 2026 5:01 PM

Why was it returned?

Multiple areas to navigate to look for status updates and comments

Detail Report

Open Print/Share > Detailed Report and scroll down to the audit Trail section to see every step, who holds the document now, each approval action and date, and any returned-with-comment

*UTEP-Request to Travel Detail Report			
1	Budget PreValidation		
2	Athletics Approver (Danny)		Daniel Garcia
3	Executive Approval <i>This step may be skipped</i>		Daniel Garcia
4	Cash Advance Approver <i>This step may be skipped</i>		
5	Budget Post Validation		
Audit Trail			
Date/Time	Updated By	Action	Description
09/18/2026 4:52 PM	Christian Test	Delegate/Proxy Request Creation	This request was created by a delegate or proxy user.
09/18/2026 5:01 PM	Christian Test	Confirmation Agreement Acceptance	UTEP Request User Submit Agreement
09/18/2026 5:01 PM	Christian Test	Approval Status Change	Status changed from Not Submitted to Submitted Comment: Step Name: Request Submitted
09/18/2026 5:01 PM	Christian Test	Exception	INFO: This request was created by a delegate/proxy.
09/18/2026 5:01 PM	Christian Test	Exception	INFO: This request was submitted by a delegate/proxy.
09/18/2026 5:01 PM	Christian Test	Approval Status Change	Status changed from Submitted to Pending External Validation Comment: Step Name:
09/18/2026 5:01 PM	Concur System	Approval Status Change	Status changed from Pending External Validation to Approved Comment: Step Name: Budget PreValidation
10/01/2026 1:55 PM	Gaby Test	Approval Status Change	Status changed from Submitted and Pending Athletics Approval to Sent Back to Employee Comment: Sending back this cash advance travel request to test department approver sent back comments Step Name: Athletics Approver (Danny)
Email Save as PDF Print Close			

How to check the status of your Request/Report

Britt's Office Purchase (MD) \$155.53

Returned Report number: 4YFYKN

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

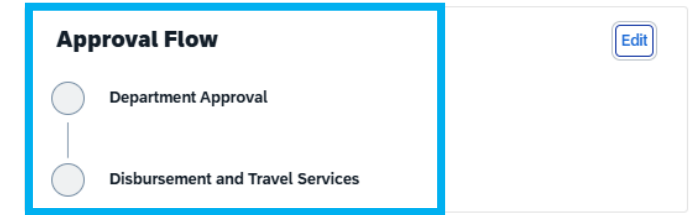
Report	
Report Header	Standard ▾
Report Totals	Receipt ⬇⬆
Report Timeline	
Audit Trail	
Allocation Summary	
Linked Add-ons	
Manage Requests	
Manage Cash Advances	

- Within the Expense Report, navigate to the **Request Details** link directly below the Request name. Select **Request Timeline** from the drop-down menu.



Report Timeline

Britt's Office Purchase (MD) | \$155.53



Icon Indicator meaning:

- **Pending approval** step will display a blue clock icon
- **Approved approval** step(s) will display a circle with a blue checkmark
- **Future pending approval** step(s) will display an empty circle.

Approver's Training

Please visit our Concur site's training resources to see the approver's training guides and videos.

Resources & Support

Visit our website: utep.edu/travel/concur

Self-service resources

Training Website

Concur timelines and training materials

Quick Guides

Step-by-step help for common tasks

Videos

Travel Request and Expense Report walkthroughs

FAQs

Updated answers to common questions

Personal support

Office Hours

Drop-in help after go-live, online or in person
Bring a live document to office hours for a walkthrough.

1:1 Support

Personalized help for high-volume users

Questions? Contact our team: travel@utep.edu

What Can You Expect Next?

From August awareness to October go-live, every milestone is designed to build confidence before users touch the system

Oct 19 – 30

Phase I Training

Hands-on training for Phase I participants

Nov 2 - 6

VIP 1:1 Training

Personalized sessions for high-volume users

Nov 2

★ Go Live — Phase I

Phase I divisions launch on Concur — VPBA, VPRI, COS, and Athletics

Nov 16

Feedback Survey Opens

Phase I survey; insights refine Phase II rollout



Thank you!

Concur was designed to help you spend less time managing travel and expenses and more time focusing on teaching, research, service, **and supporting our students.**

