Hello everyone,

This Concur update addresses four areas.

1) Expense Detail in Banner/Webapps

You can now access more information about Concur expenses in Webapps! Use Financial Queries, then scroll down to the Journal Voucher Document Detail link, key in the Concur journal document # (for batches starting with document "CON15099"posted after March 9th)[x] to obtain more details on the expenses. When the journal document is pulled up at this query, you will hover over the left side of the description field to see the following information in a pop up box –

1) Report Name
2) User
3) Report/Trip Start and End Dates
4) Header Business Purpose
5) Entry Business Purpose (which is the line item or transaction's business purpose and is an optional field)
6) Entry Comment (also at the line item or transaction and is an optional field)
7) Vendor Description
8) Payment Type (JPMC Master Card or out of pocket)
9) Card # - includes the last four digits and the cardholder's name

x - This information is under development for batches posted prior to March 9th. We are also working to add this level of detail to the transaction download.

2) Bundling of expense reports

We are seeing many users doing an excellent job of submitting reports with multiple charges. There are others who continue to prepare reports with only one charge or only a few charges. The cost of the system is based upon the volume of expense reports processed (each report counts as one charge regardless of whether it is sent back for changes). Please be sure to combine charges into one monthly report as much as possible. We understand that users may want separate reports for travel or specific trips. You are certainly encouraged to start an expense report and then add items to the report during the month in order to keep up with the activity to be included in the report.

3) E-receipts and ExpenseIt

Using E-receipts will reduce the data entry requirement. E-receipts pertain mainly to major travel vendors when travel is booked using Concur Travel. Additionally, users need to activate e-receipts and must also have a credit card at their profile. Payment using the credit card at the profile is how the vendor transmits the e-receipts to the Concur account. To activate e-receipts, follow either of the following steps:

1) New users logging into Concur will see an alert at the main menu to activate e-receipts. Click on that link or
2) At the profile section, on the left side in the "Other Settings" section, select the first item for "E-Receipt Activation".

Using either approach, Concur will ask you to agree to their terms and when that step is completed, at the top of the screen it will confirm that e-receipts are activated.

ExpenseIt app – if you enjoy using mobile app's, this app. is *strongly* recommended as the app. to use to take pictures of receipts. Its OCR capability pre-populates many of the data fields for expenses and it also helps with itemizations (to get them started). Using this app, the preparer of expense reports has fewer steps to complete at the expense report.

4) Allocating Charges

Approvers may now make changes to the fund/org/program/activity/location fields if needed (e.g. the funding source needs to be revised). Access to change allocations is at the "details" link just under the report name. Then click on allocations, more specific steps to revise allocations will be added to the blog shortly.

If you need assistance or have questions, please contact Concur's support directly (see the "contact us" page at concur.blogs.rice.edu) or the Rice team can be reached via email at concur@rice.edu.