Email Notifications

Concur offers multiple email notification options for Request, Travel, and Expense. Email notifications are utilized to alert users of different actions in Concur (e.g. Request approval, cancelled booking, new travel card charge, etc.). They are also used to remind travelers of their responsibility to manage UA paid expenses in a timely manner.

**Note:** Emails sent to users from Concur come from an @concursolutions email address such as autonotification@concursolutions.com. Emails sent from CTM come from ua@travelecm.com. UA recommends marking these email addresses as safe senders. Otherwise, the notification emails may filter to a spam folder.

Users and their delegates can control some Concur generated email notifications on their Profile. Email notifications for delegates are dependent on their own settings and the “Receives Emails” delegate permission.

1. **System Settings**

   ![Email Notifications](image)

2. **Request Preferences**

   ![Send email when...](image)

3. **Expenses Preferences**

   ![Send email when...](image)
These emails are set to autogenerate from Concur based on criteria defined by UA. The notifications come from EmailReminderService@concursolutions.com, include specific information regarding the item requiring action, and are not optional (i.e. users cannot opt out in their profile settings). The email may also include reference to applicable regulations.

These notifications are especially important since agency and travel card charges must post in Banner to reconcile expenses charged to the operating ledger. The only way to post these in Banner is through completion of a Report.

Delegates with the “Receives Emails” permission are cc’d on these notifications. After 45-90 days of inaction, the email escalates to the user’s Default Approver as assigned in Concur.

**Approved Requests without Reports**

Trigger: Based on the Business Travel End Date of an approved Request, starts 15 days after this date

Email Verbiage: You have <#> travel requests pending an expense report.

Information Provided: Start Date, Request Name, and Request Total

Resolution: Cease after either a Report associated with the Request is initiated or the Request is closed/inactivated or cancelled

**Overdue Expense Report Approvals**

Trigger: Sent to the assigned approver if Report is not approved by them after two days

Email Verbiage: You have <#> Expense Reports pending your approval.

Reports not approved within 10 days of submission will timeout and move into your supervisor’s approval queue.

Information Provided: Report(s) pending approval

Resolution: Cease after the pending Report(s) is approved

**Overdue Request Approvals**

Trigger: Sent to the assigned approver if Request is not approved by them after four days

Email Verbiage: You have <#> Travel Request pending your approval.

Information Provided: Request(s) pending approval

Resolution: Cease after the pending Request(s) is approved
Unassigned Credit Card Transactions

Trigger: Agency or travel card charges not assigned to a Report 15 days after the transaction date

Email Verbiage: You have <#> outstanding credit card transactions that are <#> days old and have not been assigned to an expense report.

If the trip has not yet taken place but you have incurred charges for Airfare, Booking Fees, Car Rental, Lodging Advanced Deposit, and Registration expenses, please assign the card charge to an expense report and define the expense type to prevent additional emails or alerts for those transactions.

For all other expenses, please add the transactions to an expense report and submit the expense report for approval now.

Information Provided: Transaction Date, Vendor, Transaction Amount, and Posted Amount

Resolution: Cease after the expense is assigned to a Report

Unsubmitted Expense Report(s)

Trigger: Based on the Business Travel End Date in the Report Header, starts 15 days after this date

Email Verbiage: You have <#> expense report(s) <#> days past the end of your trip that has/have not been submitted for approval.

Information Provided: Submit Date, Report Name, and Report Total

Resolution: Cease after either Report is submitted, deleted, or postdated in the Report Header under Business Travel End Date

Taxable - Unsubmitted Expense Report(s)

Trigger: Based on the Business Travel End Date in the Report Header, starts 90 days after this date

Email Verbiage: You have <#> expense report(s) 90 days or more past the end of your trip that has/have not been submitted for approval. Out-of-Pocket expenses will be reported as taxable income, to comply with IRS accountable plan rules.

Information Provided: Submit Date, Report Name, and Report Total

Resolution: Cease after either Report is submitted, deleted, or postdated in the Report Header under Business Travel End Date
Admin Generated

These emails are manually created and sent by Statewide or the campus travel finance office. Delegates are cc'd in case the traveler needs assistance. After 45-90 days of inaction, the email escalates to the user’s assigned Default Approver in Concur and/or the expenditure authority for the associated trip’s funding.

The timeline, frequency, verbiage, and cc'd individuals may vary by campus.

Amount Due UA

Trigger: Non-employee is included in the 101010-0469 payroll deduction report. Report is pulled the Monday before payday (every two weeks)

Email Verbiage: Please see the below message regarding the <$amount> owed for <description of expense(s) that triggered payroll deduction>. We were not able to recoup this via payroll deduction since you are not/no longer an employee. Please remit a check to the Bursar's office in the amount of <$amount> to be deposited to 101010-no org-0469 at your earliest convenience.

Please let your department know if you need assistance with this process.

(Forwarded email from Statewide) “<Campus> student/guest <Traveler’s Name> (<UA ID>) was on the payroll deduction report we ran this morning for the last 2 weeks. Their Report Key is <$#> and the amount owed to UA is <$amount>. Please work with the department to ensure this is paid back to the 101010-0469 account.”

Information Provided: Report Key and amount owed

Resolution: Traveler remits repayment for the owed amount via their campus Bursar’s Office. Payment must deposit to 101010-0469 to clear the outstanding amount owed. If deposited to different funding (e.g. trip’s funding), the department must JV the amount to 101010-0469.
Outstanding Travel Advance for Request <ID>

Trigger: Based on Business Travel End Date of an issued travel advance, starts 30 days after this date

Email Verbiage: On <date>, our office issued a <$amount> travel advance for Request <ID>, "<Request Name>." Per the UA travel regulations, travel advances must be cleared 15 days after trip completion (R05.02.060(14)(h)). This advance is still outstanding and needs reconciliation through a completed expense report.

If this trip was cancelled, the advance return must be documented on the expense report using the Cash Advance Return expense type. For employees, this will trigger a payroll deduction to repay the outstanding advance. For non-employees, please work with your department to remit repayment to 101010-0469 via the Bursar's Office.

Information Provided: Travel advance amount, date issued, and associated Request ID and name

Resolution: Reconcile the travel advance in Concur via the associated Report; cannot reconcile travel advances outside of Concur

Expired Ticket Credit

Trigger: Only sent for assumed expired credits with an outstanding airfare card charge

Email Verbiage: This email is to notify you that you have an expired ticket credit in the amount of <$amount> for a ticket purchased on <date> using the Concur travel system. Unfortunately, now that this unused ticket has expired and the value is lost, the associated credit card charge should no longer be held in Concur. In most cases, lost ticket credits should be assigned to an unrestricted funding source. Please submit an expense report to reconcile this expense at your earliest convenience.

If this credit was used towards another trip, please reconcile the outstanding airfare charge on an expense report associated with that trip.

Please let us or your travel coordinator know if you have any questions.

Information Provided: Ticket amount and original purchase date

Resolution: Reconcile the expense on a Report associated with the cancelled or completed trip