

Emails in Concur

Help! Why am I getting so many emails from Concur?

Emails from Concur can be grouped as follows:

- Emails a traveler receives:
 - When status changes, including approvals, have occurred on their request or expense report, or when card transactions or receipts have been received.
 - When they have travel card charges that have been posted to their Concur account, but are not yet assigned to an expense report.
 - When they have travel card charges that have been assigned to an expense report, but the expense report has not yet been submitted.
 - When they have expenses marked as paid by traveler on a Concur expense report that has not been submitted.
- Emails an approver (supervisory or financial) receives:
 - When a request or expense report is sent to them for approval.
 - When a request or expense report has been awaiting their approval longer than the designated limit.

Each of these emails will be covered in a separate section, with tips on how to minimize the email activity you receive.

Emails a traveler receives when status changes, including approvals, have occurred on their request or expense report, or when card transactions or receipts have been received.

These emails are contingent upon action by others. They are needed within the system to let the traveler know the status of their expense report.

Emails a traveler receives when they have travel card charges that have been posted to their Concur account, but are not yet assigned to an expense report.

If you have unassigned travel card charges outstanding, you will receive emails on the following schedule:

- Beginning at 30 days and ending 59 days after the charge, you will be emailed every 7 days reminding you to assign these charges to a report.
- Beginning at 60 days and ending 89 days after the charge, you will be emailed every 5 days reminding you to assign these charges to a report.
- Beginning at 90 days and ending 119 days after the charge, you will be emailed every 3 days reminding you to assign these charges to a report.

Assigning charges for all expenses will completely stop the email reminders for unassigned charges. Depending on the expense type of the charge, you may then begin to receive emails for unsubmitted charges. See the following section for more details.

Financial Services monitors the old charges and will be contacting you personally if old transactions are not cleared.

Emails a traveler receives when they have travel card charges that have been assigned to an expense report, but the expense report has not yet been submitted.

If you have travel card charges assigned to an expense report that has not been submitted, you MAY receive emails on the following schedule:

- State and university policy limits what kinds of expenses can be paid in advance, including expenses on a travel card. Advance payment is limited to airfare, hotel deposits, and registration. **Therefore, assigning charges to an expense report using these expense types will stop this group of email reminders entirely:**
 - Airfare
 - Agency Fees
 - Hotel-Advanced Deposits (note that this is not the same as Hotel/Lodging)
 - Registration fees
- For charges other than those assigned to the expense types listed above:
 - Beginning at 30 days and ending 59 days after the charge, you will be emailed every 7 days reminding you to submit the expense report.
 - Beginning at 60 days and ending 89 days after the charge, you will be emailed every 5 days reminding you to submit the expense report.
 - Beginning at 90 days and ending 119 days after the charge, you will be emailed every 3 days reminding you to submit the expense report.

Emails a traveler receives when they have expenses marked as paid by traveler on a Concur expense report that has not been submitted.

If a traveler has expenses assigned to an expense report that are marked as being “paid by traveler”, it is assumed that the travel has already occurred or will soon occur. Expense reports should be submitted as soon as practical after the completion of the trip. Therefore, beginning 14 days after the “paid by traveler” expense has been assigned to a report, the traveler will begin receiving reminders to submit the report. These email reminders will be generated every 7 days after the first reminder.

These reminders are not generated for mileage only expense reports, or if your report contains only a “paid by traveler” expense type of per diem-daily meals & incidentals.

You can eliminate these emails by submitting the expense report.

Emails an approver (supervisory or financial) receives when a request or expense report is sent to them for approval.

Emails are sent once to each approver when the request or expense report has reached their particular workflow step.

These emails cannot be turned off.

Emails an approver (supervisory or financial) receives when a request or expense report has been awaiting their approval longer than the designated limit.

An approver receives reminder emails beginning at 5 days after the request or expense report reaches them in workflow. After that, email reminders are generated every 2 days until the approver takes action on the expense report or request or until the report times out. The report will “time out” and move from the approver’s queue on the 10th day following the submission or last approval of the request or expense report.

If the approver is a supervisor, once the timeout occurs the report goes to the supervisor’s supervisor for approval.

If the approver is a cost object approver (a financial approver designated in FAMS), the report will skip all remaining cost object approver workflow if the approver does not approve it before it times out.