



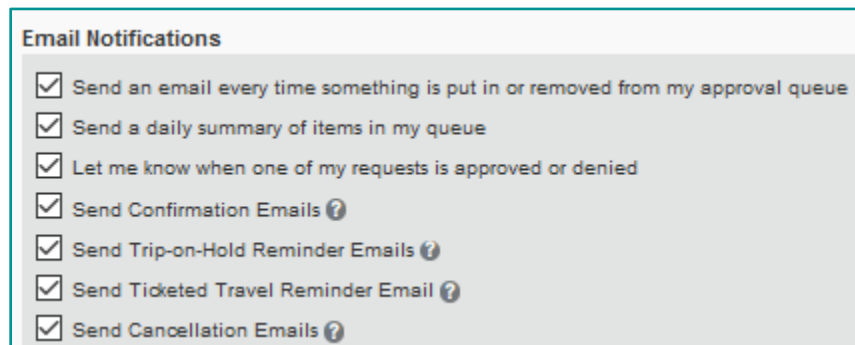
## Email Notifications

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](mailto:autonotification@concursolutions.com). Emails sent from CTM come from [ua@travelctm.com](mailto:ua@travelctm.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.

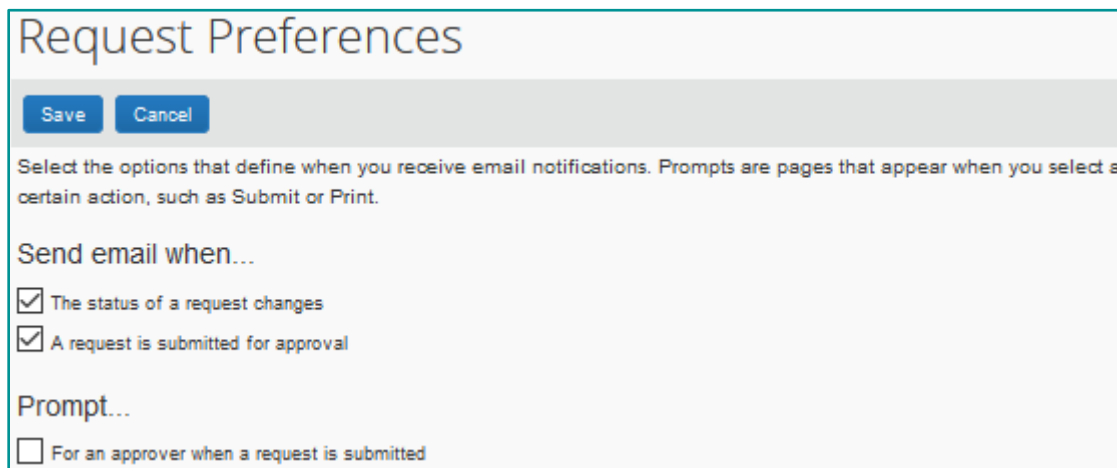
### 1. System Settings



**Email Notifications**

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails ?
- Send Trip-on-Hold Reminder Emails ?
- Send Ticketed Travel Reminder Email ?
- Send Cancellation Emails ?

### 2. Request Preferences



**Request Preferences**

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

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- The status of a request changes
- A request is submitted for approval

Prompt...

- For an approver when a request is submitted



### 3. Expenses Preferences

## Expense Preferences

Save
Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Send email when...**

- The status of a cash advance changes
- A cash advance is submitted for approval
- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval

**Prompt...**

- For an approver when an expense report is submitted

**Display...**

- Make the Single Day Itineraries page my default in the Travel Allowance wizard

## Concur Generated

These emails are set to autogenerate from Concur based on criteria defined by UA. The notifications come from [EmailReminderService@concursolutions.com](mailto: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