



Email Notifications

3. Expenses Preferences

EXPENSE PREFERENCES

Save Cancel

Select the options that define when you receive email notifications. Reports 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 cards 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

Concur Generated

These emails are set to autogenerate from Concur based on criteria defined by UA. The notifications come from EmailReminderService@concur.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

