



Concur Terminology Reference Guide

1. **Active Reports:** At the top of the Manage Expenses page is the Report Library section. Your active reports appear by default, but you can easily view other reports. From the View list, select one of the predefined options or define a custom date range.
2. **Active Requests:** At the top of the Manage Requests page is the Request Library section. Your active requests appear by default, but you can easily view other requests. From the View list, select one of the predefined options to view requests by status.
3. **Alert:** Indicates an exception, and is indicated by a yellow triangle, which does not prevent submission of the report. Serves as a reminder to double-check this exception before submitting the report.
4. **Approval Change:** Approval change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.
5. **Audit Trail:** A record of changes made to a request and/or expense report. There are two types of items that appear in the Audit Trail: actions at the report level (approvals) and actions at the entry level (where changes are made).
6. **Dashboard:** The dashboard is the main page of Concur which shows pending tasks, open reports, available expenses, and upcoming trips.
7. **Delegate:** Delegates are assigned by the traveler in his/her profile settings to allow another user to book travel, build requests and expense reports on his/her behalf.
8. **E-Receipts:** E-receipts are electronic receipts that are automatically sent to Concur from participating suppliers.
9. **Exception:** An action, which is indicated by a red exclamation, which prevents submission of the report/request. Exceptions include details of the action the traveler needs to take to clear the exception and proceed.

10. **Expense Report:** Reconciliation of PCard, Travel and Non-Travel expenses.
11. **Frequent Traveler Programs:** Airline, hotel, car rental and rail vendor programs that reward frequent travelers.
12. **Mobile App:** The Concur mobile app allows travelers to book travel, add expense entries and store receipts and other supporting documentation.
13. **Payment Status Change:** Payment status change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.
14. **Previewer:** An employee who can review (not approve) reports on behalf of an approver. This role is assigned by the approver in his/her profile.
15. **Request:** A request is used to receive approval for an upcoming trip such as conferences, meetings, and other travel. Requests are utilized to estimate the cost of upcoming trips, verify the funding/budget, and for approval to travel. Requests are also used to request and maintain procurement and travel cards.
16. **Segments:** Segments and estimated expenses are used to add estimated amounts to the Request for travel related expenses (air, hotel, rental car, meals, etc...).
17. **Travel Allowance:** Travel Allowance is the daily meal allowance defined by the General Services Administration (USGSA).
18. **Travel Assistants/Travel Arranger:** Travel Assistants/Arrangers are assigned by the traveler within his/her profile to allow another user to book travel on his/her behalf.