



Travel – Elevated Permission Preview



Elevated Permissions

Overview:

Ability for financial users to view and query in process expense reports and requests. Group aware delegate access and group aware reporting

Access:

- View limited to org groupings
- Access granted via travel office with appropriate approval



Processor Abilities

Process Reports

Group: All Groups I Can Access

Run Query ▾ Starting Group ▾ Group List Settings Create/Manage Queries ▾

Find every report where

Report/Trip Name
Report/Trip Name
Report Key
User First Name
User Last Name
User ID
Report Id
Submit Date
Processor Start Date
Approval Status
Payment Status
Receipts Received
Receipt Image Available
Report Total
Amount Approved
Report Type

Equals
Equals
Before
After

| AND
Disputed
Pending Exception Review
Submitted and Pending Concurrence
Budget Approval
Pending Accounting Review
Pending Supervisor Approval
Pending Level 1 Approval
Pending Level 2 Approval
Pending Supplier Setup
Pending Cash Advance Administered
Pending Grant Officer Approval
Pending Purchasing Approval
Pending General Accounting Approval
Pending Property Accounting Approval

List Settings X

Columns

Report Type
 Cash Advance Return Received
 Payment Status
 Report Key
 *Activity
 *Org
 Report Date
 Submit Date
 *A/U (C7)
 *ADSC (O1)
 *AP Vendor Address (C14)
 *AP Vendor Location (C13)

OK

Cancel

Create New Query

Edit Saved Query

Test



View

Group: All Groups I Can Access

Run Query ▾ Starting Group ▾ Group List Settings Create/Manage Queries ▾ Preferences ▾

Find every report where

Approval Status Equals Pending Supervisor Approval AND

Report/Trip Name Employee Name Approval Status Report Total Receipt Status Report Type Cash Advance Return Payment Status Report Key *Activity *Org Report Date Submit Date

<input type="checkbox"/>	DC/New Jersey 7.2024	[REDACTED]	Pending Supervisor Approval -	\$2,360.46	Received / Not ...	Expense Type	Not Paid	130244	(26932) RESE...	(00810) SCIEN...	07/23/2024	07/30/2024
<small>✖ Code: COW, Level: 2147483647; This step was auto-approved because the Expense report was submitted by an individual with budget approval authority (GFA). (RESEARCH SUPPORT, PARASHAR (26932)) The expense report has been moved to the next workflow step.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small>												
<input type="checkbox"/>	HPGRC2024	[REDACTED]	Pending Supervisor Approval -	\$1,030.25	Received / Not ...	Expense Type	Not Paid	130681	(00000) Not Ap...	(02101) PHYSI...	07/30/2024	07/30/2024
<small>✖ Code: COW, Level: 2147483647; This step was auto-approved because the Expense report was submitted by an individual with budget approval authority (GFA). (AMBIENT SUPERCONDUCTIVITY (58503095)) The expense report has been moved to the next workflow step.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small>												
<input type="checkbox"/>	UPCEA Solar July 24 JE	[REDACTED]	Pending Supervisor Approval -	\$1,455.63	Received / Not ...	Expense Type	Not Paid	130378	(01474) UCL O...	(02198) FINAN...	07/25/2024	07/30/2024
<small>✖ Code: COW, Level: 2147483647; This step was auto-approved because the Expense report was submitted by an individual with budget approval authority (GFA). (UCL OPS SPECIAL INITIATIVES (01474)) The expense report has been moved to the next workflow step.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small>												
<input type="checkbox"/>	48th Annual Utah PA & NP Confere	[REDACTED]	Pending Supervisor Approval -	\$450.00	Received / Not ...	Expense Type	Not Paid	130683	(00000) Not Ap...	(90998) UUH P...	07/30/2024	07/30/2024
<small>⚠ Code: ENDDATE, Level: 51; Under typical circumstances, expense reports should not be submitted until after the trip has occurred. Please verify the transaction dates and make any needed corrections. If you're asking for reimbursement prior to dates of travel, you may be charged additional trip fees for each expense report submitted.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small>												
<input type="checkbox"/>	Summer 2024 Ghana Trip	[REDACTED]	Pending Supervisor Approval -	\$122.86	Received / Not ...	Expense Type	Not Paid	130674	(29905) ENSIG...	(02073) UNIVE...	07/30/2024	07/30/2024
<small>✖ Code: COW, Level: 2147483647; This step was auto-approved because the Expense report was submitted by an individual with budget approval authority (GFA). (EN SIGN GLOBAL (29905)) The expense report has been moved to the next workflow step.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small> <small>⚠ Code: DEANSKIP, Level: 60; Level 1 approval is needed on this expense report. Level 1 approval is defined as one approval level above the AE/PI. Certain expense types (like business meals/entertainment or airfare paid on a personal credit card) require extra approval.</small>												
<input type="checkbox"/>	PAS 5/2024 (official)	[REDACTED]	Pending Supervisor Approval -	\$1,214.38	Received / Not ...	Expense Type	Not Paid	129680	(00902) PEDIA...	(00848) PEDIA...	07/17/2024	07/30/2024
<small>✖ Code: COW, Level: 2147483647; This step was auto-approved because the Expense report was submitted by an individual with budget approval authority (GFA). (PEDIATRICS OPERATING ACCOUNT (00902)) The expense report has been moved to the next workflow step.</small> <small>⚠ Code: DELPROXY, Level: 1; This expense report was submitted on behalf of the traveler by an assigned delegate/proxy.</small>												

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Expense

SAP Concur **Expense**

Manage Expenses

Card Transactions

Cash Advances

Processor

Find every report where

Approval Status	Equals	Pending Budget Approval	AND
			Go

Find every report where

User ID	Equals	00177910	AND
			Go

Find every report where

Submit Date	After	07/01/2024	AND
Report Total	Greater Than	1000	Go

SAP Concur Fusion [MCKELLAR, MELANEY]

Summary Details▼ Receipts▼ Print / Email▼

Details▼	Receipts▼	Print / Email▼
Report		
Report Header		
Totals		
Audit Trail		
Approval Flow		
Report Payments		
Comments		
Allocations		
Allocations		
Travel Allowances		
Itineraries		
Expenses & Adjustments		
Reimbursable Allowances Summary		



Request

SAP Concur Requests ▾

Manage Requests

Process Requests

Find every request where

Approval Status	Equals	Pending Level 2 Approval
Approval Status	Equals	Approved
Submit Date	After	07/01/2024

Find every request where

User ID	Begins With	00177910	AND		
	Request ID	*Trip Type (C8)	Employee Name	Request/ Trip ...	Request/ Trip Start Date
	F6GT	(DOOS25) Do...	MCKELLAR, MELANEY	03/21/2024	03/18/2024
<p>⚠ ***IMPORTANT!! Your reservation is not confirmed/ticketed until this Request is submitted and approved before the expiration date shown in red at the top right.*** If the Request status is Approved, you can disregard this notice.</p> <p>⚠ This request has one or more entry-level exceptions.</p>					
	CTJ3	(DOOS25) Do...	MCKELLAR, MELANEY	07/18/2023	07/15/2023
<p>⚠ You selected option #2 Book with Agent - (CBT) Christopherson Business Travel. You MUST either submit the Book a Trip form by copying and pasting this link to your browser https://travel.utah.edu/secure/book-a-trip/ or email the agency your trip details at travel@admin.utah.edu. Concur DOES NOT send Request info to CBT. Failure to submit the form or email the agency will result in the trip not getting booked. Agency bookings are done Mon-Fri 8am to 4pm.</p>					
	C4JJ	(DOOS25) Do...	MCKELLAR, MELANEY	04/11/2023	04/09/2023
	C37J	(DOOS25) Do...	MCKELLAR, MELANEY	03/19/2023	03/16/2023
	733P	(II35) Int'l Trav...	MCKELLAR, MELANEY	08/08/2022	07/27/2022
	6XKN	(60000) CAMP...	MCKELLAR, MELANEY	12/13/2022	12/11/2022
	6WMN	(60000) CAMP...	MCKELLAR, MELANEY	11/16/2022	11/12/2022
	6T4L	(60200) CAMP...	MCKELLAR, MELANEY	07/23/2022	07/16/2022
	6T4K	(60200) CAMP...	MCKELLAR, MELANEY	06/07/2022	05/23/2022
	6T4F	(60200) CAMP...	MCKELLAR, MELANEY	06/11/2022	06/07/2022
	6REU	(60000) CAMP...	MCKELLAR, MELANEY	11/14/2022	11/13/2022
	6M96	(60200) CAMP...	MCKELLAR, MELANEY	08/07/2022	07/28/2022
	6IVE	(60200) CAMP...	MCKELLAR, MELANEY	10/14/2022	10/09/2022



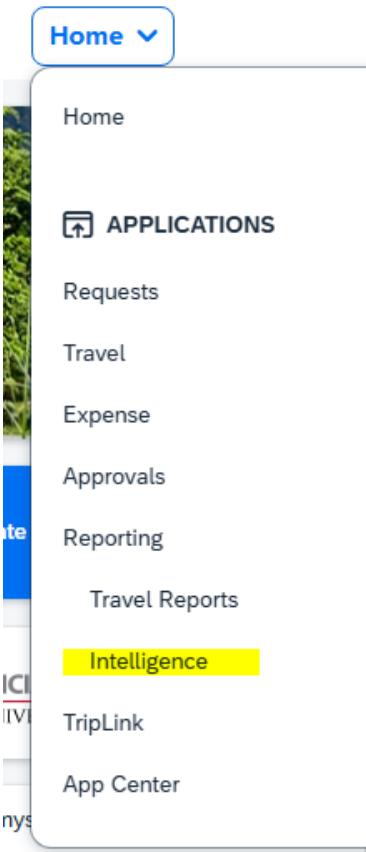
Excel Sample

	A	B	C	D	E	F	I	J	L	M	N
1	Report/Trip Name	Employee Name	Approval Status	Currency	Report Tot	Receipt St	Payment Status	Report Key	*Org	Report Date	Submit Date
2	Unreconciled Expenses Cle	MCKELLAR, MELANEY	Approved	USD	1174.64	Received /	Sent for Payment	117466	PHARMACOLOGY AND TOXICOLOGY	08 Apr 2024 00:00:00	28 Jun 2024 15:03:59
3	Reimbursement GRC	MCKELLAR, MELANEY	Pending Supervisor A	USD	-340.00	Not Requir	Not Paid	127849	PHARMACOLOGY AND TOXICOLOGY	28 Jun 2024 00:00:00	28 Jun 2024 12:15:49
4	SAP Concur Fusion	MCKELLAR, MELANEY	Approved	USD	549.87	Received /	Payment Confirmed	116591	FINANCIAL SERVICES	02 Apr 2024 00:00:00	02 Apr 2024 08:13:32
5	SFN Veros Hotel 1 night	MCKELLAR, MELANEY	Approved	USD	336.26	Received /	Sent for Payment	105319	PHARMACOLOGY AND TOXICOLOGY	13 Dec 2023 00:00:00	24 Jan 2024 13:20:17
6	GRC Jaclyn Winter	MCKELLAR, MELANEY	Approved	USD	1655.00	Received /	Sent for Payment	104771	PHARMACOLOGY AND TOXICOLOGY	08 Dec 2023 00:00:00	22 Jan 2024 16:12:49
7	GRC Georgia Morgan	MCKELLAR, MELANEY	Approved	USD	1995.00	Received /	Sent for Payment	104770	PHARMACOLOGY AND TOXICOLOGY	08 Dec 2023 00:00:00	22 Jan 2024 16:12:16
8	SFN-Veros	MCKELLAR, MELANEY	Approved	USD	275.00	Received /	Sent for Payment	91808	PHARMACOLOGY AND TOXICOLOGY	14 Aug 2023 00:00:00	29 Sep 2023 10:09:22
9	Rohacs Recruiting Trip	MCKELLAR, MELANEY	Approved	USD	1120.88	Not Requir	Sent for Payment	93042	PHARMACOLOGY AND TOXICOLOGY	28 Aug 2023 00:00:00	28 Aug 2023 13:47:46
10	Tippetts	MCKELLAR, MELANEY	Approved	USD	36.00	Received /	Sent for Payment	91847	PHARMACOLOGY AND TOXICOLOGY	15 Aug 2023 00:00:00	28 Aug 2023 13:30:10
11	Society for Indus-Winter	MCKELLAR, MELANEY	Approved	USD	880.00	Received /	Sent for Payment	91798	PHARMACOLOGY AND TOXICOLOGY	14 Aug 2023 00:00:00	28 Aug 2023 13:26:11
12	Hong-Boston	MCKELLAR, MELANEY	Approved	USD	1440.51	Received /	Sent for Payment	91806	CVRTI	14 Aug 2023 00:00:00	15 Aug 2023 11:41:48
13	Wind River-Bring Horvath	MCKELLAR, MELANEY	Approved	USD	526.00	Received /	Sent for Payment	91811	PHARMACOLOGY AND TOXICOLOGY	14 Aug 2023 00:00:00	15 Aug 2023 08:37:56
14	Acuna Pilarte--San Diego	MCKELLAR, MELANEY	Approved	USD	1075.00	Received /	Sent for Payment	91784	PHARMACOLOGY AND TOXICOLOGY	14 Aug 2023 00:00:00	14 Aug 2023 14:07:07
15	Berlin Glia-T32 Lopez	MCKELLAR, MELANEY	Approved	USD	1028.91	Received /	Sent for Payment	89009	PHARMACOLOGY AND TOXICOLOGY	12 Jul 2023 00:00:00	27 Jul 2023 10:15:39
16	Koh-France	MCKELLAR, MELANEY	Approved	USD	1136.77	Not Requir	Sent for Payment	87845	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	12 Jul 2023 10:26:33
17	Mesmar-Hotel	MCKELLAR, MELANEY	Approved	USD	803.57	Received /	Sent for Payment	87925	PHARMACOLOGY AND TOXICOLOGY	30 Jun 2023 00:00:00	06 Jul 2023 15:32:35
18	New Orleans-Nwagbo	MCKELLAR, MELANEY	Approved	USD	436.41	Received /	Sent for Payment	87924	PHARMACOLOGY AND TOXICOLOGY	30 Jun 2023 00:00:00	30 Jun 2023 08:27:48
19	Nwagbo--Cambridge	MCKELLAR, MELANEY	Approved	USD	35.70	Received /	Sent for Payment	87901	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 16:31:01
20	Bell-Barcelona	MCKELLAR, MELANEY	Approved	USD	765.80	Received /	Sent for Payment	87879	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 16:28:45
21	Mensah Barcelona	MCKELLAR, MELANEY	Approved	USD	982.80	Received /	Sent for Payment	87887	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 16:25:01
22	Cornlessen Barcelona	MCKELLAR, MELANEY	Approved	USD	1185.62	Received /	Sent for Payment	87892	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 16:24:09
23	Dean Peterson-CISI	MCKELLAR, MELANEY	Approved	USD	35.70	Received /	Sent for Payment	87858	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 14:37:33
24	SFN Veros	MCKELLAR, MELANEY	Approved	USD	155.00	Received /	Sent for Payment	87850	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 14:23:38
25	SFN-Cadeddu	MCKELLAR, MELANEY	Approved	USD	375.00	Received /	Sent for Payment	87843	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 13:52:10
26	Wind River-Bring Horvath	MCKELLAR, MELANEY	Approved	USD	150.00	Received /	Sent for Payment	87841	PHARMACOLOGY AND TOXICOLOGY	29 Jun 2023 00:00:00	29 Jun 2023 13:37:50
27	Gordon-Veros	MCKELLAR, MELANEY	Approved	USD	1170.00	Received /	Sent for Payment	85123	PHARMACOLOGY AND TOXICOLOGY	06 Jun 2023 00:00:00	06 Jun 2023 08:57:00
28	Kossack- Recruitment	MCKELLAR, MELANEY	Approved	USD	1013.00	Received /	Sent for Payment	80116	PHARMACOLOGY AND TOXICOLOGY	26 Apr 2023 00:00:00	05 May 2023 15:10:03
29	Lyon Cornelissen	MCKELLAR, MELANEY	Approved	USD	1270.32	Received /	Sent for Payment	79706	PHARMACOLOGY AND TOXICOLOGY	24 Apr 2023 00:00:00	05 May 2023 14:58:01
30	Faculty Recruitment--Wong	MCKELLAR, MELANEY	Approved	USD	851.36	Received /	Sent for Payment	79184	PHARMACOLOGY AND TOXICOLOGY	19 Apr 2023 00:00:00	26 Apr 2023 11:48:36
31	Heine Recruitment Trip	MCKELLAR, MELANEY	Approved	USD	361.95	Received /	Sent for Payment	79700	PHARMACOLOGY AND TOXICOLOGY	24 Apr 2023 00:00:00	24 Apr 2023 11:04:09
32	T32 workshop speaker - Riz	MCKELLAR, MELANEY	Approved	USD	1187.82	Received /	Sent for Payment	78595	PHARMACOLOGY AND TOXICOLOGY	14 Apr 2023 00:00:00	14 Apr 2023 11:56:44
33	Deschenes Visit	MCKELLAR, MELANEY	Approved	USD	425.69	Received /	Sent for Payment	78592	PHARMACOLOGY AND TOXICOLOGY	14 Apr 2023 00:00:00	14 Apr 2023 11:47:34
34	Wong Recruitment Trip 1	MCKELLAR, MELANEY	Approved	USD	47.50	Received /	Sent for Payment	77551	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	06 Apr 2023 09:00:25
35	Heather Snell Second Visit	MCKELLAR, MELANEY	Approved	USD	3250.12	Received /	Sent for Payment	77531	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	05 Apr 2023 16:05:31
36	Qiu Recruitment Hotel	MCKELLAR, MELANEY	Approved	USD	624.88	Received /	Sent for Payment	74758	PHARMACOLOGY AND TOXICOLOGY	15 Mar 2023 00:00:00	05 Apr 2023 15:56:33
37	Laura Kay Nisenbaum Hote	MCKELLAR, MELANEY	Approved	USD	483.73	Received /	Sent for Payment	77546	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	05 Apr 2023 15:50:35
38	Paul Jenkins Hotel March 2	MCKELLAR, MELANEY	Approved	USD	334.63	Received /	Sent for Payment	77545	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	05 Apr 2023 15:43:56
39	Kalpana Merchant Visit	MCKELLAR, MELANEY	Approved	USD	263.04	Not Requir	Sent for Payment	77534	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	05 Apr 2023 15:22:20
40	Muhsen Marriott Hotel	MCKELLAR, MELANEY	Approved	USD	405.20	Received /	Sent for Payment	77526	PHARMACOLOGY AND TOXICOLOGY	05 Apr 2023 00:00:00	05 Apr 2023 14:30:33
41	SOT Airbnb	MCKELLAR, MELANEY	Approved	USD	4917.88	Received /	Sent for Payment	76867	PHARMACOLOGY AND TOXICOLOGY	30 Mar 2023 00:00:00	31 Mar 2023 14:10:27
42	SOT Student Receipts	MCKELLAR, MELANEY	Approved	USD	447.00	Received /	Sent for Payment	76864	PHARMACOLOGY AND TOXICOLOGY	30 Mar 2023 00:00:00	30 Mar 2023 15:50:21
43	Mensah AES	MCKELLAR, MELANEY	Approved	USD	2243.74	Received /	Sent for Payment	74936	ADD PROGRAM	16 Mar 2023 00:00:00	23 Mar 2023 13:57:17

ProcessorReportsList



Reporting/Intelligence



Group aware reporting

- Unassigned/unexpensed credit card transactions
 - Aged reports and approvals
 - Date range reporting

Credit Card Transactions

Prompts

Date Range

From:

▼

To:

▼

Options

Payment Types:

- Cash Advance Return
- Cash/Personal Card
- Out of Pocket
- PCard - Campus
- PCard - Hospital
- Pending Card Transaction
- Test - PCard - Campus
- Test - PCard - Hospital
- Test Cash out of pocket
- Test Travel Card
- Travel Card

Transaction Statuses:

- Assigned to Report
- Configuration Hidden
- Payment Hidden
- Potential Duplicate
- Prior to Card Assignment
- Prior to Effective Date
- Unassigned to Report
- User Hidden

Employees:

Keywords:
Type one or more keywords separated by spaces.

Search

Results:

Insert
Remove

Choice:

Select all
Deselect all

Select all **Deselect all**

C	D	E	F	G	H
	Transaction Status Value	Merchant	Transaction Date	Posted Date	Posted Amount (credit card currency)
	Unassigned to Report	INTERNATIONAL SOCIETY FO	Jan 23, 2025	Jan 24, 2025	49,982.69
					415.00
					415.00
	Unassigned to Report	AIRBNB * HM8T4ZPXPW	Nov 28, 2024	Nov 29, 2024	1,280.42
		AIRBNB * HM8T4ZPXPW	Jan 13, 2025	Jan 14, 2025	-1,280.42
					0.00
	Unassigned to Report	HOTEL*HOTELBOOKING	Oct 18, 2024	Oct 21, 2024	123.97
		HAMPTON INN	Jan 15, 2025	Jan 17, 2025	314.07
		THE NORMANDY HOTEL	Jan 28, 2025	Jan 30, 2025	836.01
	Unassigned to Report	DELTA AIR 0062303274351	Feb 4, 2025	Feb 5, 2025	1,274.05
					298.49
					298.49
	Unassigned to Report	VENETIAN/PALAZZO ROOM RS	Jan 29, 2025	Jan 30, 2025	713.44
		INTERNATIONAL TRANSACTION	Jan 21, 2025	Jan 22, 2025	713.44
	Unassigned to Report	ISHLT	Jan 30, 2025	Jan 31, 2025	515.00
		MARRIOTT SALT LAKE CIT	Jan 11, 2025	Jan 13, 2025	515.00
	Unassigned to Report	GRAND AMERICA HOTEL	Jan 15, 2025	Jan 17, 2025	5.00
					5.00
	Unassigned to Report	MYAST.ORG	Jan 8, 2025	Jan 9, 2025	200.00
		UNIV OF UT WEB PAYMENT	Jan 29, 2025	Jan 30, 2025	747.00
					947.00
	Unassigned to Report	DISPUTE CREDIT	Jul 11, 2024	Jul 11, 2024	-2,275.68
		DISPUTE REBILL	Aug 14, 2024	Aug 14, 2024	1,137.84
		COLLEGE GREEN HOTEL DUBLI	Oct 25, 2024	Oct 28, 2024	1,622.28
					484.44
	Unassigned to Report	CHEVRON 0307696	Feb 3, 2025	Feb 3, 2025	22.03
		TST*PHOENIX MAGAZINE CAF	Jan 30, 2025	Feb 3, 2025	15.30
					37.33
	Unassigned to Report	ALLIANZ TRAVEL INS	Jan 21, 2025	Jan 22, 2025	39.27
		HAWAIIAN AI 1732311311334	Jan 22, 2025	Jan 23, 2025	581.80
		WESTERN ASSOCIATION OF CO	Jan 21, 2025	Jan 23, 2025	895.00
		HILTON WAIKOLOA	Jan 23, 2025	Jan 27, 2025	352.73
					1,868.80
	Unassigned to Report	WIFIONBOARD	Jan 26, 2025	Jan 29, 2025	49.95
					49.95
	Unassigned to Report	KIMPTON HOTEL MONACO SLC	Jan 17, 2025	Jan 20, 2025	1,334.18
					1,334.18
	Inassigned to Report	GORDON RESEARCH	Feb 26, 2025	Feb 27, 2025	-1,230.00



Thank You!

Further Questions

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Your Partner in Financial Success

