Q: How do I log into Concur?
In your browser go to concur.uoregon.edu and use your single sign on duck ID to log in.

Q: We are planning travel for after Concur goes live. Where will the travel reimbursement be processed? When will Duckweb and the Airfare Authorization Request form go away?
As soon as Concur is available, expenses can and should be processed in Concur. Remember that Request is mandatory to start an Expense report. The airfare authorization form will be available for a couple of weeks for emergency cases only. Duckweb travel reimbursement form will be turned off once all reimbursements in the system when Concur goes live are processed.

Q: When can a traveler log into Concur?
Profiles have been established for all UO employees prior to our go-live date. Concur users can log in to assign delegates or to add information to their profiles using their SSO (Single Sign On duckid and password).

Q: When should we start using Concur?
March 27, 2018 is the projected go-live date. There will be many validations that will happen that day for incoming and outgoing feeds and the travel office will send updates about those validations and when all systems are go. Reimbursements should not be started in Duckweb after April 1 and need to be entered into Concur.

Q: Will Concur replace the registration for Risk and Safety?
Yes, as long as the traveler completes a pre travel Request, Risk and Safety will have their trip information in Concur Locate.

<u>Concur Profiles</u>

Q: How do I create a profile in Concur?
There will be a onetime upload the UO HR database so all UO employees will have a Concur profile. Travelers or their delegates can add additional information like frequent flyer and travel membership numbers, passport information, personal preferences, ICE (In Case of Emergency) contact information, cell phone numbers. For new profiles, please contact the Travel Office with the new employee name, 95#, and department name.

Q: How do I add to or modify my Concur profile?
In the upper right hand corner of the home screen, hover over the "Profile" head symbol and click on Profile Settings. You may add airline frequent flyer numbers, frequent driver or stay membership numbers for car companies and hotels, passport information, delegates who can work on your behalf, cell and emergency contact phone numbers, and travel preferences. If you are working as a delegate for a traveler, hover over Profile, Acting as Other User and click on the name of the traveler whose profile you wish to work.

Q: What if my traveler has a UO 95# but does not have a duckid?
If your traveler is a temporary employee with a UO Payroll record, they can claim their duckid.

- Contact HR for a PAC reset
- You will get an email to reset your PAC. Go to Duckweb to reset.
- Go to duckid.uoregon.edu to claim your duckid.

Concur Delegates

Q: How do I become a delegate for a traveler?
The traveler can log into his profile and hover over Profile in the upper right hand corner of the screen, then click Profile Settings. Under Request Settings, Expense Settings and Travel Settings, see the associated Delegate link. The Traveler can then give you the permissions required. Suggested is "Can Prepare", "Can View Receipts", "Can Approve" (if you are an approver) and "Can Prepare for Approver".

Q: I am a delegate for a traveler, may I submit the request (or expenses report) on their behalf?
Request and Expense reports must be submitted by the traveler as they must review, then sign to the required legal statement. When working as a delegate for a traveler, the submit button says "Notify Employee" and they receive a push email.

Q: How is the approver role determined?
This really is up to the department. In training, we mention that the Request Approver can be the same person who is currently approving air purchases at forms.uoregon.edu. Or this could be an opportunity to rethink current practice, consider best business practice and decide who should be approving. It should be someone with authority to spend budgetary funds. For some departments, a budget authority is first and then a department head. Some departments have the department head and then the delegate so they can move it to the booking tool to book the air.

Q: How does a traveler assign a delegate?
After logging into Concur, click on Profile in the upper right corner and Profile Settings. In the menu options on the left side, click Request Delegates, click Add and start typing the name of the Delegate. Select from the results and click Save. Expense and Request share delegates so assigning here will allow the delegate to work in both places. Click Can Prepare (auto clicks Can View Receipts) and Receives Emails.

Q: Is there any other way to assign a delegate other than the traveler doing it?
Travelers will need to log into Concur in order to review and submit both Requests and Expense reports. Logging into assign a delegate is a low stress introduction into Concur and an easy task with which the travel coordinator can assist. In an emergency, the travel office can assign the delegate function.

Q: Can a user have more than one delegate?
Yes, a traveler/user can have any number of delegates. More than one is recommended in order to have a back up.

Concur Approvers

Q: How do we know who the approver is for our department or a particular traveler?
You will need an approver for the Request and an approver for the Expense report. This might be the same person. The person who approves air requests now could be the person who will approve Request. The person who currently signs on the duckweb reimbursement form might be your Expense approver. Best business practice says this should always be someone to whom the traveler answers – someone at a higher level position.

Q: The Traveler's Request was approved, does Expense also need to be approved?
Yes, the Request provides a framework of expenses but often the Expense report might vary quite a bit. The Expense approver should provide a final review and approval.

Q: I am sharing costs with another department, how do I allow for all Travel Expenditure Authorities to approve?
The Expense report must be approved by one person but can be forwarded to multiple approvers. The first approver clicks the button Approve and Forward and types in the email address of the next approver. The final approver simply clicks on Approve.

Q: If our usual (default) approver is out of the office, how do I assign to a back-up approver?
Call the Travel Office to reset the approver.

Q: Can a budget authority approve their own travel?
A traveler can never approve their own travel. Every traveler will need to have an approver assigned for their Requests and for their Expense reports and this person should be someone to whom they report.

Q: Will there still be department certifiers (processors)?
When Concur first launches, the travel office will provide the Processor role for all of campus, reviewing and processing reports for payment. The Processor role will be extended to travel certifiers upon demonstrating proficiency in Concur.

Q: Who can see completed expense reports?
Traveler, delegate, approvers, processor, audit roles.

Q: When an email prompt is sent to an approver, will it show the traveler's name?
Yes.

Q: How does an expense get approved by the department head or budget supervisor?
Approvers are set up for both Request and for Expense. Departments can decide to have one approver or two. Travel Coordinators will be able to assign approvers to travelers for several weeks after our go-live date. After that, the Travel Office can enter your approver information.

Q: Who sets up or decides who should be approvers?
This is the decision of the department and their workflow. Best business practice says an approver should be someone to whom the traveler reports to rather than a subordinate. You might consider that the Request approver is the person who currently approves airfare or current pretrip approvals. An Expense approver is the person who currently signs the duckweb travel reimbursement form. Approvers can delegate their authority to someone else to sign but they always retain the responsibility of the role.

Q: What if the approver is out of the office?
If the approver has internet access, an approver can approve from their mobile device or computer. Otherwise, a backup approver can be assigned to the traveler for the date range the main approver is unavailable.

Q: How can I see what I have approved?
Click on Approvals in the upper black bar. Click on Reports, View and select the reports you would like to view.

Concur Request to Booking Tool

Some travelers are attempting to book on the Travel page before their request is submitted and approved. These bookings prompt the user to create a new request. We may have to recall these requests to allow use of the booking tool.

Other travelers are clicking the link in their "your request was approved" email notification, and booking directly on the Travel page. These bookings are not associated with the approved request and prompt the user to create a new request.

Once a request is approved the user **must click the Book link on the Request page** (status column on right) to launch the booking tool.

Please share these 4 steps with your colleagues and any travelers who wish to self-serve:

Step 1. Login

Visit concur.uoregon.edu, enter Duck ID username and password. If serving as delegate click Profile drop down upper right corner, select traveler and Start Session.

Step 2. Flight Search

If you do not know the cost of air and need to do a search, you can use the Booking Tool to **LOOK but do not book**.

Step 3. Request

Click Request (black bar), then click New Request (white bar)

IRed bars indicate required fields

Header tab:

- Select appropriate policy from the drop down menu.
- Request Name, enter the trip location and date.
- Enter the trip start and end dates. If the traveler will be taking personal time the trip dates should include the personal time.
- Request/Trip Purpose, select from the drop down menu
- Destination City, enter name of the city that the traveler is doing business. This is what determines GSA per diem allowances for meals and lodging. Destination country will autofill.
- Traveler Type, select from the drop down menu.
- Trip Type, select from the drop down menu. Generally, the travel will trip type will be domestic or international.

- How will you book your travel ? select “Online Concur Booking Tool” to book online. All other options will not allow you to launch the booking tool and will show a Request status of “Expense” instead of “Book” once the request is approved.
- Personal time, If yes, enter the dates of personal travel in the following field.
- Absent any term ? If Yes, add information in the business purpose to explain.
- Business Purpose, enter up to 500 characters describing benefit to the university. If more space is needed, attach PDF using the attachment button in the upper right corner of the screen.
- Index Activity and Location Codes, there will be an opportunity to change or allocate to multiple indexes in the Expense Report.

Segment tabs:

- Airfare or Railroad - If you are including personal time, you will complete the travel information and price but should contact the TMC for the comparison quote for the business only itinerary. You will need to provide the Request approval ID to the travel agent to complete the ticket purchase. Enter air or rail details and save.
- Rental Car - Enter rental details and approximate amount. Save.
- Hotel - Enter approximate lodging total, dates and location. **NEW:** The default credit card held by the TMCs can be used to guarantee the hotel. Payment must be arranged on the traveler’s One Card or personal card upon check-in.

Expenses tab:

- Enter any other material trip expenses (remember this is only an estimate). Save

Submission and Approval

- Travelers will click Submit. Delegates will click Notify Employee,
- The Request will be forwarded to the traveler’s default approver. Once approved, the status will change from “Submitted and Pending Approval” to “Approved”. If the approver has questions or asks for edits to the request, they will Send the Request back to you with comment. The comment will appear in your Active Request list and you can view the comment in the Audit Trail. Make necessary corrections and answer questions, then submit the request again. Make sure to add comment for the approver in the Request Header.

Step 4. Book:

Once the Request is approved, go to the Concur home screen and click Request to see a list of Active Requests. Find the approved request and click the Book link in the right status column. This will launch the booking tool with pre-populated Request information.

Warning: The Request approval email contains a link to the Concur Travel page. If you attempt to book using the Travel tab in Concur your booking will not be associated with the approved request and will prompt you to create a new request.

Q: Why is a Concur Request required?

- A Request provides the department prior notice of travel to allow for budgetary planning as well as staffing coverage.
- Request pre-populates the Expense report which collects and itemizes receipts in real time when using the One Card and partner vendors.
- Request feeds location information to Concur Locate to provide Duty-of-Care. In case of emergency, a weather event, or natural disaster UO Risk and Safety is able to contact and assist UO travelers.

Q: What if I need to change or modify a Request?
This will depend on where the request is in the process.

If the change in plans happens *prior* to approval, the traveler can recall their request and make any changes needed.

If the request has already been approved, the traveler will need to create a copy of the request, make the appropriate alterations and submit the new request, while closing the original request as "inactive". This is necessary so the correct dates and destination feed Concur Locate and accurate dates will be needed to sync with One Card charges.

Q: How do you copy a Request for reoccurring trips?
Go to the Request tab and click Manage Requests. You will see a list of your requests.
You can copy previously submitted Requests. Click on the check box to the left of the Request you want to copy.
You will notice that the boxes "light up" in the upper right of the screen. Click Copy Request.
A window will open to allow you to select a new Request name and new dates. Make changes and click OK.
The business purpose and expenses will copy to the new Request.

Q: How do we handle student travel?
Determine if the student is traveling for their personal benefit (participant support) or whether they are traveling to the benefit of the UO, i.e. traveling because of their UO employment. If participant support, use the Guest policy. If UO business travel, use the regular (employee) policy.

Q: How do I book student participant support travel - 55105?
Book airfare by calling the TMC. The travel agent will use the delegate's uoregon.edu email address to tie the booking into Concur to the delegate's profile. The charge will be assigned to the delegate's profile from the nightly bank feed in Concur to reconcile. Any additional expenses are processed as a banner invoice for payment directly to the student. Participant support payments using account code 55105 are not required to be compliant with UO travel policy and are not paid in Concur.

Concur Travel (Booking Tool)

Q: What is Concur Travel booking tool?
Concur Travel is a robust booking tool providing travelers or their delegates with Air, Rail, Car and Hotel booking options. Simply enter dates and destination and Concur Travel will show UO preferred airlines offering UO negotiated discounts, contracted State of Oregon car rental partners and discount hotel rates. We recommend a call to UO's TMC (Travel Management Companies) for assistance with international itineraries.

Q: What if a traveler requires a Multi-City itinerary or an international itinerary?
The Concur booking tool can is able to handle multiple stops by clicking on the Multi City search option. A traveler or delegate can also book international travel. However, we do recommend a call to the TMC when dealing with a more complicated itinerary or with federally funded grant travel to be assured of the lowest fare, Fly American policy compliance and to be sure when combining airlines that they have a baggage and ticketing agreement.

Q: Which Traveler Type do I use for a GE?
If the traveler is traveling for their paid position, they are considered an employee. If the traveler is traveling on behalf of their education, they would be considered a student.

Q: How do I book a rental car when there is a personal time. Can my traveler still use the booking tool?
The State of Oregon contract/discounts cannot be used if a traveler has personal time. If the traveler chooses Hertz, Enterprise or National, call or email the TMC or go online to reserve. The booking tool can be used for other car companies not on contract.

Q: Can I make reservations for the conference hotel through the booking tool?
No, conference hotels almost always require a call to a special number to book the negotiated contract rate – often a third party broker.

Q: As the TEA (Travel Expenditure Authority) for the department, if a request is approved but then the traveler books more expensive air, will I see the increase?
Yes, if you make the reservation as the traveler's delegate. If a traveler makes his or her own reservation, you will see the amount when you prepare the expense report.

Q: How do I book an Enterprise/National contract car rental so it will direct bill to the department?
Be sure that your department has direct bill set up. In the booking tool is a box called "comments to the agent". Before completing the booking, send a note to the TMC requesting the direct bill code to be attached to the reservation. The TMC should have these numbers on file.

Q: How does a traveler unused tickets?
An unused ticket link appears for each traveler indicating available ticket credits. The credit will automatically be used on a new ticket unless the Traveler or their Delegate calls or emails the travel agency to let them know they do not want to use the cancelled ticket credit.

Q: If an airline ticket booked through the booking tool is cancelled by the airline, how do I rebook?
Call the TMC or airline to rebook your travel. Depending on whether the cancellation is due to weather or a mechanical problem will determine how the credit is used.

Q: How are reservations paid?
The TMCs hold a UO ghost card used for pay for airfare or rail booked either on the Concur booking tool or by calling the agency directly. The ghost card can be used to for a hotel guarantee but not to pay for a hotel. Travelers can apply for the One Card or use a personal card for other business travel expenses. If a trip involves personal time, no personal expense can be charged to any UO credit card.

Q: Can a traveler book flights on their own using their own credit card?
Travelers may either use the Concur booking tool or call our UO TMCs who will help them book air and will charge it to the UO ghost card they hold.

Q: What if air is already booked when Concur starts?
The expense is added to the reimbursement (expense report) and a receipt should be uploaded in order to be reimbursed.

Q: Can I start with the Booking tool in Concur?
You can explore pricing on the booking tool but you cannot make a booking until you have an approved Request.

Q: Can I book a conference hotel using Concur?
No. Conference hotels are on a special contract and often must be booked either through a third party broker or directly with the group desk at a hotel in order to take advantage of negotiated pricing. You should email the reservation confirmation to plans@concur.com to sync up with the rest of the travel reservation.

Q: If you are booking on behalf of a traveler, will reservation confirmations come to their email?
If you are logged in as the traveler's delegate, travel confirmations will associate with their profile and the traveler will receive email confirmations. In the delegate assignment, there is a check box for the delegate to also receive emails.

Q: Can the TMC accept a personal credit card for purchases?
Air is purchased using the ghost card on file with the TMC. If an airline ticket is more expensive due to the addition of personal time, the traveler must provide their personal card for their portion. Hotels can be guaranteed/charged to a personal credit card.

Q: Does Request provide a list of allowable expenses?
Request is an estimate of big ticket items. Concur users will see an abbreviated list of reimbursable expenses. When completing the actual Expense report for reimbursement, there is a more complete list of allowable expenses.

Q: Can you book a Motor Pool vehicle in Concur?
No, Concur is not associated with our local motor pool. See the Travel Webpage for the link to book a motor pool reservation.

Q: If my trip involves my personal vehicle do I need to create a Request?
Yes, this provides visibility to your department that you are traveling and provides Risk and Safety Locate information. In addition, it starts your Expense report to allow receipts from One Card or Concur partner vendors to find a home.

Q: When booking a guest, do we need to provide date of birth and gender?
The information is required by TSA and the airlines for security reasons. A guest may choose to book their own air and be reimbursed. If the UO is to book/pay for air, the information is required. **In the case of a candidate, the UO MAY NOT ASK DATE OF BIRTH.** The candidate will need to call the TMC to provide this information.

Q: How is a Request or Expense report submitted?
If prepared by a Traveler, click the Submit Report button. If prepared by a Delegate, click the Notify Traveler button.

Concur Expense

Q: What is Concur Expense?
Concur Expense is used to reimburse travelers for business travel expenses. One Card credit card transactions and Concur partner vendor expenses are automatically captured on the traveler's expense report with a nightly information feed. Receipts and support documents are uploaded electronically. Expense reports are forwarded to budgetary authority for electronic approval saving time and paper.

Q: How do you attach a receipt?
There are three ways to attach receipts:

1.) Receipts can be scanned and saved to your computer drive. Click "Attach Receipt" and go to "File Selected for uploading" and click Browse. Navigate to the drive and select the receipt and click Attach. Receipts should be scanned separately. (Grouping receipts together in one upload will require that you attach the same file multiple times and it will show all the receipts.)
2.) Mobile option: Take a picture of the receipt with your phone. Click on the send icon, and then email to receipts@concur.com to go to your receipt gallery. If you need the receipt to go to a different person, enter their email address in the subject line of the email.
3.) Mobile option: From the Concur mobile app, click on the camera icon labeled "Receipt". Snap a picture and click "done". The receipt will automatically load to your receipt gallery.

Q: When the receipts are in a foreign currency, do we need to upload the OANDA printouts into Concur?
No, Concur will convert the receipt based on the location entered into the report. Receipts should still be translated into English.

Q: How do you limit an approved amount on an expense report?
Personal credit card: If the amount is great, consider removing expenses to get closer to the desired amount, returning receipts to your traveler to claim as unreimbursed business expenses on their personal tax return.
One Card: Expenses cannot be removed and must be assigned to an expense report. Enter a line item with Expense type as "Personal/One Card/Non Reimbursable" to reduce by the desired amount.

Q: How can you override an account code?
Account codes are hardcoded into the Expense Types so please review to be sure you have selected the correct expense type. If you feel Concur may have an error, please contact the Travel Office.

Q: What about averaging the hotel when some nights are low and some are higher. Can we still average to meet the per diem limitations?
Yes, use the Additional Information field to explain.

Q: How are per diems calculated?
Concur uses the GSA per diem tables to determine reimbursable amounts for lodging and meal per diem.

Q: What about unallowable expenses on the One Card, how are these dealt with?
For personal or foundation expenses that will not be reimbursed, select Expense Type "Personal/One Card/Non Reimbursable", Personal/Non Reimbursable", "Foundation/One Card/Non Reimbursable", or "Foundation/Non Reimbursable" and the amount is deducted from the reimbursement.

Q: What if a traveler has expenses that will be paid by an Outside Source?
Mark the expense with Expense Type: "Personal/Outside Source funded" to indicate that the UO is not paying for this expense.

Q: If a traveler uses Motor Pool, is there a place on the form to note that?
If there is no expense, it probably isn't necessary, however you can note this in the business purpose/additional information field.

Q: How should a Mileage reimbursement be entered?
If a single line item, find Personal Vehicle Mileage in the Expense Type list. You can either enter the amount of miles you calculate from the traveler's odometer readings. Or you can use the handy Google Map mileage wizard by entering the address of either home or work (whichever is closest per UO Travel Policy) and the business location.

Q: What if I have a monthly mileage log?
Enter information in the business purpose about the nature of the business and that you are attaching a mileage log. Go to Expenses and find Personal Car Mileage. Enter the official workstation location in the "From" box and in the "To" box enter free text like "Various data sites in Lane Co." or "Lane Co HeadStart Schools" or similar. Enter the total of the mileage being claimed and in Additional Information you can say "See Mileage Log attached".

Q: If my traveler has already purchased an airline ticket prior to the Concur launch, is it necessary to create a Request?
Entering a request only takes a couple of minutes and is necessary to create an Expense report.

Q: How long can we use Duckweb?
Duckweb will remain open until we clear the pipeline with current reimbursements. If you have preloaded anything that is months away, it should be transferred to Concur. We will monitor for new entries after April 2 and request that you enter those into Concur. I envision being able to close it down in a couple of months.

Q: For recurring mileage trips, how will the Request and Expense work?
Travelers who makes the same trip every week might consider keeping a monthly mileage log they can upload and enter the month's mileage as one line item with supporting documentation (mileage log). Concur has a cool copy feature that allows you to copy the same Request again and again when you consistently take the same trip.

Q: How do I monitor outstanding expense reports with an active Request? Or for those pending approval?
Email reminders are sent out for outstanding expense reports and unclaimed ghost card and One Card expenses. Reporting will be coming soon. Because we have no data yet, we will be working on report gathering and training when we actually have something to work with.

Q: How is the expense report limited to a certain amount?
If a traveler has a $500 budget, only enter expenses to get close to that amount. (Return receipts to travelers to claim on their personal taxes as an unreimbursed business expense.) If the amount still exceeds the budget, select one expense and mark a portion as Personal/Non Reimbursable to reduce to the desired amount.

Q: How do we find the GSA per diem allowance?
There is a link to the lookup on the UO Travel Policy webpage. Bookmarking the GSA table would be a timesaver: https://www.gsa.gov/travel/plan-book/per-diem-rates When using the booking tool for hotels, you will see the GSA lodging per diem listed for the city selected.

Q: How is mileage calculated?
You can use the Mileage calculator that shows when Personal Vehicle Mileage is selected. Per UO travel policy, mileage can be claimed from home or work, whichever is closer.

Q: How do you upload additional documentation – conference, grant information, travel logs, etc?
Use expense type Other Supporting Documentation and select Attach Receipts to upload additional information.

Q: How do you account for expenses paid by another entity/institution?
If only a portion of expenses are to be covered by another entity, select expense type Personal/Outside Source funded to indicate these need to be subtracted from the reimbursement. If the entire trip is to be funded through another entity, select Trip Type $0 Dollar Trip. This can be done as a Request in order to provide visibility to the department that a traveler will be gone so as to cover teaching and advising responsibility and to provide Concur Locate information to Risk and Safety.

Q: How do I add Account Codes?
Each expense type has an account code attached. You can verify what the account code is by clicking on Print/Email to review the expense report detail.
Q: Are travel day meals automatically calculated at the 75% IRS allowance?
Yes.

Q: Do hotel charges have to be itemized?
Yes.

Q: If a default index is required, can it be changed?
Yes. And expenses can be allocated to any number of indices

Concur Locate

Q: What is Concur Locate?
Concur Locate provides global duty of care to all UO travelers. Concur works in conjunction with IJet to prepare, monitor and assist travelers, providing a multinational response in cases of security, natural disaster, weather events, airline service disruption, etc.

One Card Corporate Card

Q: What is the One Card?
US Bank One Card is a corporate bill, corporate pay Visa credit card for UO business travelers. The card is used for reimbursable business expenses only by the cardholder. The UO pays the credit card bill, travelers are responsible to reconcile their charges on a Concur Expense report as soon as they return from their trip.

Q: How can I get a One Card?
The campus roll out for One Card will be in late April or early May 2018. Contact the UO Travel Office 6-3518 or lajacoby@uoregon.edu . The application is available at: *forms.uoregon.edu*
Navigate to "Choose a Category", Business Affairs, Travel and select the form called UO Travel Corporate Credit Card Request.

Q: Is the One card a replacement for the current T&E card? When will the One Card be available? Who should have them? Can they put hotel expenses on the one card?
The One Card program will roll out a month or two after Concur is launched. At that time the current US Bank T&E card program will be discontinued. Travelers who travel several times a year or have need of a credit card are candidates for a One Card. One Card can be used for all reimbursable travel expenses.

Q: Who qualifies for a One Card?
Any UO traveler who has a payroll record and travels for UO business is eligible to apply for a One Card for travel expenses.

Q: Will the One Card be mandatory?
The One Card is recommended and will save much time when completing an expense report as charges will come in through the daily bank feed and automatically find the traveler. No manual entry. The charges are paid by the UO so travelers do not incur interest nor do they need to pay a bill.

Q: Will the travelers be able to use their personal cards for other travel expenses, like taxi's , etc? Will these come into Concur automatically?
Traveler's will not have personal credit cards linked to Concur. Expenses using personal cards will be entered manually.

Q: What if the traveler has a refund on the One Card?

1.) **De minimus amount (less than $50):** Submit the expense in full. When the refund comes into Concur:
    a. Refund is assigned for a second expense report to the original request and processed as a supplemental reimbursement, **OR**
    b. Refund can be assigned to another report being sure to explain and cross reference the original trip and payment information.

2.) **Significant amount (over $50):** Leave the expense off the current report while waiting for the refund. Then process as a second expense report, assigning it to the original Request with an explanation regarding the original charge and the refund and cross reference with the original report and Banner payment ID.

Concur Mobile App

Q: How do I install the Concur mobile app?
You will need to download and sign on just one time for the Concur app to always be active in your mobile device

Directions:

- In your computer, sign into Concur.uoregon.edu and enter SSO password – Single Sign On: how you log into your computer every morning.
- In the upper right corner click on your name and then on Profile Settings

- Click on Concur Mobile Registration. **(Do not click get started button).**
- Click on Create a Concur Mobile PIN
- Click Set concur Mobile PIN. (This will be a onetime password to activate the app).
- On mobile device, enter your uoregon.edu email address on the sign in page when it asks for Work Email or Username. Click next.
- When it asks for your password, enter the PIN you just created (not the password to your Shibboleth sign on)

Q: How does the Concur mobile app work?
The mobile app allows you to:

- Manage your Requests
- See Trips
- Take pictures of receipts
- Enter Expenses, attach receipts
- Calculate personal vehicle mileage
- Review and submit Expense Reports for yourself
- Review and Approve Expense Reports for Others

Q: Does the Concur app tell me if I have a flight delay?
No. The Concur app captures receipts and can be used to organize, submit and approve expense reports. Travel alerts are provided with TripIt Pro.

Q: Is there a charge for apps associated with Concur – Concur, TripIt Pro, IJet?
No, these apps are free. No one is required to download them. They are optional and allow travelers to view expenses, upload pictures of receipts, provide electronic itinerary organization and receive push notifications from airline, car rental companies, travel safety, etc.

Q: How do we get the apps?
See instructions in this document for directions to download associated mobile apps.

Q: What if a traveler doesn't use a cell phone and cannot download the apps or take pictures of receipts?
Use of a mobile device is entirely optional. Travelers or their delegates can scan receipts which can be created into a pdf and stored on a computer drive to be attached to their expense report.

TripIt Pro

Q: What is TripIt Pro?
TripIt Pro is a mobile download free to UO business travelers. TripIt Pro organizes all your travel plans in one place, with real-time flight alerts, gate change notifications, and helpful reminders. The app keeps track of all your reward points and miles, checks for better seat availability and will quickly finds another flight if your plans suddenly change. Reservations confirmations are emailed to plans@tripit.com and TripIt Pro instantly creates a master itinerary for each of your trips.

Concur Reports

Q: What reports will be available to travel coordinators (departments in general)?
We will continue to develop and train on reporting as we get closer to the launch date and are working in Concur.

Q: Are travelers required to attend training?
All UO travelers should plan to attend training to learn how Concur will benefit them, how to assign a delegate, how the mobile app functions.

One Card

Q: Does my traveler need to apply for a One Card? Until he/she does apply can he/she get a cash advance?
US Bank One Cards are company bill/company pay cards for UO travelers who travel 1-2 or more times per year. Once application is submitted, cards arrive in about 4 days. Cash advances are for travelers traveling with student groups and will otherwise be limited.

Q: Can the One Card be used for meals?
One Card can be used for meals but they must be marked as Personal/Non Reimbursable. Travelers are paid meal per diem per UO travel policy. If meal expenses exceed the reimbursed meal per diem, the difference is deducted from their reimbursement.

Q: What if expenses are put on the One Card that cannot be reimbursed?
Travelers must sign an agreement that the card is for business travel reimbursable expenses only and any other use is a violation. Expenses come into a traveler's profile in a nightly bank feed. All expenses must be assigned to an Expense Report. Accidental personal expenses or Foundation expenses or otherwise non reimbursable expenses are marked Personal/Non Reimbursable and are deducted from the reimbursement. If non-reimbursed expenses exceed the payment, the charges are placed on the employees billing account and they receive an email to use QuikPay to pay back the UO. The traveler may call the Travel Office to have the payment immediately transferred to payroll. If the bill is not paid in 120 days, the payment automatically comes from their next paycheck.

Q: What if a traveler has a One Card and their hotel includes personal nights?
The traveler should arrange for the hotel to bill business travel and personal travel separately, using a personal card for the personal nights. Personal travel cannot be charged to the One Card which is paid by state funds.