**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.

**Concur Profiles**

**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.

**Q: 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.

**Concur 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?
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.

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?
The booking tool can is able to handle multiple stops by clicking on the Multi City search option. However, the Travel Office recommends a call to the TMC when dealing with a more complicated itinerary for proper ticketing and for confirm the most economical fare.

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.

**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.

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.

**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 lajacyby@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:**

**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.

**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 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.