

Concur Tips – Guest Travel Part 2: Guest with ongoing relationship and expense reports.

Option #2 – Guest with multiple transactions/ongoing relationship – Guest will receive multiple, ongoing reimbursements:

- Guest requires a Concur profile. Go to forms.uoregon.edu, Business Affairs, Travel, Concur Guest Intake form.
- Travel Office builds Concur profile for guest, including delegate(s) and Approver(s). Delegate must work on behalf of traveler as they do not have a uoregon.edu email address to access the Concur profile.

Air:

- Submit Concur Request for traveler, choosing “How will you book your travel” - either #1 Use Concur online booking tool, or #2 TMC direct.
- Once approved, follow directions above for Concur booking tool or TMC booking.

Reimbursement (Expense Report):

- Delegate or UO Host logs into Concur to their profile. From the list of active Requests, click on “Expense” in the Action column.
- Delegate completes expense report and uses the Print/Email button to email report summary to guest for review and approval. Guest must supply an email saying:

“I have reviewed my trip to DESTINATION on DATE for \$XXX.XX and I certify that this claim is true and correct and that no part has been claimed previously or will be claimed from any other source.”

- Delegate uploads guest’s approval email to Expense type “Other Supporting Documentation” adding note in Additional Information box: Guest Approval.
- Delegate submits on behalf of guest traveler.

Note: Be sure to use the Concur Guest policy when booking travel for profiled guests. See screenshots for previous scenarios as a guide.