Concur User Manual

Roles

Traveler/User-All UO employees with a payroll record (including student employees and graduate fellows), set up in a nightly automatic feed from Banner.

Guest Traveler/User-Users who do not have a UO payroll record, but are traveling for UO business or as participants (participant support). Profiles for these users will be set up manually under the Guest Policy in concur.

Delegate-A user who can act in Concur for another user. Travelers may assign their own delegates in Concur.

Request Approver- A person with implied or designated budget authority for the department. This person is generally a level above the traveler (supervisor) or an employee who has been designated by someone above the traveler to approve travel requests.

Expense Approver- A person with implied or designated budget authority for the department. This person is generally a level above the traveler (supervisor) or an employee who has been designated by someone above the traveler to approve expense reports.

Request Event Manager-A user who will be creating group requests (multiple travelers going on the same trip). This role can copy a request to different users.

Profile

Assigning Delegates-Request and Expense

Log on to Concur with your Duck ID at https://concur.uoregon.edu.

Click on the Profile box at the top right of the Concur homepage.

From the list on the left side of the screen select Request Delegate from the Request Setting group. (Request and Expense modules share delegates)

Click Add button.

Search by typing your delegates name or email address. When the delegates name appears in the list, select them.

A list of check boxes will appear by the delegates name, check the applicable boxes for the tasks/responsibilities you want the delegate to be able to perform for you (prepare reports, view receipts, use reporting, receive emails).

Assigning Default Approvers

For assignment of default approvers please contact the Travel Office.

Assigning a Travel Management Company

Please contact the Travel Office.

Request

An approved Request is required to:

- Establishes the trips's budget
- Populates Concur **Locate** for UO Safety and Risk's duty of care requirements
- Launches the Travel Online Booking Tool
- Starts the Expense report

Log in to Concur at https://concur.uoregon.edu (shibboleth log-in screen will appear) using your Duck ID and password.

Booking as a Delegate for your traveler:

- Log in with your credentials.
- Go to Profile drop down list in the upper right corner and select "Acting as other user?" Select the person you will be working for from the drop down list and click Start Session.

Booking as yourself, the Traveler: simply log in to start your Concur session.

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

Booking Tool:

Once the Request is approved, go to the home screen and click on Requests to see a list of Active Requests. Locate the approved request and click the Book link in the right status column. This will launch the booking tool which will have populated with the Request travel information.

Copying a Request (within one traveler profile)

Requests may be copied. This is helpful when a traveler regularly takes the same trip with same business purpose and set of expenses.

Going to the Request Tab and clicking the Manage Request tab. You will see a list of your requests.

Click on the box to the left of the request you want to copy.

Once you click the box you will see boxes "light up" on the upper right of the screen for Delete Request, Copy Request, Close/Deactivate Request.

You can copy a request once it has been entered and the business purpose and expenses will copy over.

Cloning a Request (copying a request to more than one traveler)

This is used when you have a group of travelers all going on the same trip, with same business purpose, and set of expenses.

To use the cloning feature, the user must have the Event Manager Role in their profile.

The Event Manager must be a delegate for all of the travelers they will be sending the cloned request to.

The travelers who will share the cloned request must be in the same group within Concur.

Go into Request tab, click Create New at the top of the screen. If you have the Event Manager Role as part of your profile when you click “Create New” you will get a drop down menu where you can select either New Request or New Event Request. Click on New Event Request to be able to clone the request to additional users.

You will enter all of the header information. (Please note that the index for each event attendee will default to the default index on their individual profile. On the Expense Report the final travel expenses may be allocated to the desired index.)

Complete the segments and expense sections.

To enter the additional users there is a box on the right where you will enter the users’ names and select them when their user name appears. You will do this for as many users as will be on this trip.

Once the list is complete you will click the Generate & Notify button on the right, this will launch the request for each of the users on the list.

The user who has been sent the cloned request will have to go into their profile to submit the request for approval.

Once submitted the Request will be sent to the travler’s default approver for review and approval. Once approved, the traveler or delegate would be able to purchase airfare with an agent or via the Travel Booking Tool.

Expense for Travel

From home screen, click on Request, Manage Requests.

Find the Request associated with the trip you are reimbursing.

On the right side, in the action column there will be an “Expense” button. Click this button to launch a new Expense Report associated with the approved request.

Header

Fill in the Business Purpose and click next at the bottom of the screen.

Travel Allowance (aka per diem)

Remember to Save, Save, Next, Next-then create expenses!

Travel Allowances box will pop-up where you will complete the per diem meal section.

Enter the departure city and date and time of departure, and enter the arrival city and dates and time of arrival. Click **save**.

Enter the return trip date, or if this is a multi-stop trip, you will enter the next “leg” of the trip. After each itinerary stop, click **save**.

Once all itinerary stops have been entered click **next.**

A box will appear with the itinerary you entered, click **next**.

Another box will appear with a per diem grid. The allowable amount appears on the right.

Remove meals that were provided and consumed by the traveler by clicking the check box for the applicable meal per diem.

To take out all meal and incidental per diem click the exclude all button on the left for either each individual day they will not claim or for all days.

To access the travel allowance grid again, go to Details, under the Travel Allowances list click Expenses and Adjustments. The grid will appear and you can make any necessary changes. When edits are completed click Update Expenses

From the Details menu, you can also select to create a new itinerary for Travel Allowances. If creating a new itinerary you will have to delete any existing itineraries that are within the dates of travel because Concur will not allow for multiple itineraries that share dates.

Import Expenses

Expenses charged to the One Card, Ghost Card, and through Concur partner vendors will appear in the travelers “trip library” as an available expense.

Click on Import Expenses (just under the trip identifier) and a list of available expenses will appear.

Click on the check box next to the expense you want to import to your expense report and click the Move button.

The expense will appear on the left hand side of the screen where you will attach receipts, itemize, and allocate as necessary.

New Expenses

Click + New Expense button.

Select the expense type from the menu on the right of the screen.

Complete the fields with transaction dates, vendor name, city of purchase, amount and any additional information to identify purpose of the expense (for example, taxi to meeting with Professor X at University of California San Diego).

Save.

Receipts

When a receipt is required for an expense the following icon will appear next to the expense .

Itemization

Itemization is required for hotel expenses.

A hotel expense record will have two tabs, one for the expense detailing the date, dollar amount, and payment type. The second tab is for the itemization of hotel expenses.

Once you have selected the expense, to itemize, you can click on the itemize button at the bottom of the screen or click on the Nightly Lodging Expenses tab.

Fill in the check in and check out dates, this will calculate the number of nights.

Fill in the nightly room rate and taxes. There are three fields for room taxes, if there are more taxes or other nightly expenses (for example resort fees), these will be added as an additional charge.

Save itemization.

If the room rate is different each night, once you have saved the itemization, you can go into each line item and adjust to the correct amount.

If there are one-time expenses, such as a meeting room rental, you will enter nightly expenses as one itemization. Once you have saved the itemization for the nightly expenses.

There will be an amount or expense left over and a new itemization tab will appear.

Select the expense type for the remaining expenses from the drop down list.

Enter the amount and notes to explain the expense and save.

New itemizations will appear until the whole amount on the hotel bill has been itemized.

For expenses such as room service or any other personal expense not allowable under travel policy will be itemized as a personal expense.

Details Tab

The Details Tab allows the user to access the header, travel allowance, allocations, and the work flow of the expenses report.

Receipts Tab

To view items that need a receipt, click on the receipts tab and select Receipts Required.

To attach a receipt from this view, click Attach Receipt Images button.

Select the line item you will be attaching the receipt to.

Then browse to locate the receipt PDF or Picture, select the PDF and upload. The receipt image will attach to the expense.

How to upload receipts to Concur

Receipts may be scanned as a PDF and uploaded into Concur, via browsing computer files.

Travelers may use the Concur Mobile App to take photographs of pictures with their phone or tablet. The app is connected with the traveler's profile and will flow into the traveler's receipt library automatically.

Travelers or delegates may take pictures or scan receipts and send them to receipts@concur.com, put the traveler's uoregon.edu email address in the subject line of the email and attach the receipt images. The receipts will flow into the traveler's available receipts.

Attachment files (receipts and documents) must be a PNG, JPG, PDF, HTML or TIF file format.

How to upload documentation (conference/meeting agenda or other supporting documentation)

+ New Expense

.08 Other Supporting Documentation

Fill in the data fields, the amount field will be 0.

Click "Attach Receipt" button in the bottom right of the screen.

Select documentation from your available receipts OR Browse to select the documentation from a file saved on your computer.

UO Detailed Report Print/Email

Click on the Print/Email button to view the Details of the expense report and attached documentation.

From this screen you can email the report, print, or create a PDF.

Submitting, Approval, and Processing the Expense Report

Once the delegate (or traveler) has completed the report, the traveler will need to submit the report for approval by logging in and clicking the submit report button.

An attestation will appear and the traveler will select Accept & Submit button to send to their approver.

The approver will review and approve or send back to the traveler for edits/clarification.

Once approved, the Expense Report will be forwarded to the UO Travel Office for Processing (the status will be Submitted: Approved and in Accounting Review).

Checking on Status of an expense report

The traveler or delegate may check the status of their report by logging onto the Concur website. The traveler will click into the Expense tab and their open reports will show in a grid.

Once processed, the status will show Processing Payment. The traveler's coordinator may also check in the Banner using form FWIVNDH.

Guest Travel

Book airfare for guests by contacting one of the UO contracted travel agents and use the Airfare Authorization Request form via https://forms.uoregon.edu to process an approval for the guest airfare.

To reimburse guests for travel expenses please use the Duckweb Travel Reimbursement form.

More information to come on guest travel using Concur.