

Introduction

Concur is the best in class software solution for travel booking and reimbursement management software used by many higher ed institutions as well as corporations around the world. Concur allows for electronic receipt capture and approval routing, and faster turnaround times on reimbursements. It provides flexible and customizable workflow features to assist departments and travelers streamline processes working within a managed travel program.

Q: How do I log into Concur?

Preferred browsers are Chrome or Firefox. Go to concur.uoregon.edu and use your duck ID to log in.

Concur Profiles

Concur Travel Manual Step-by-Steps: <https://ba.uoregon.edu/travel/concur>

“Enable E-Receipts in Concur”

Concur Resources: Concur Training Videos: <https://ba.uoregon.edu/content/concur-training-videos>

Concur Tips:

[“Personalize your Profile”](#)

[“Concur Traveler Profile”](#)

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: Anything else I should add to my profile?

- Cell phone number so the airlines can reach you in the event of a weather cancellation or delay.
- Click on Email Addresses and “Verify” your uoregon email address to facilitate the flow of information between your delegate, the mobile app and Triplt Pro.
- E-Receipt Activation – click to allow the flow of your receipt automatically to be attached to your expense reports from partner Concur vendors.

Q: I am a new employee and my Concur profile is not completely set up.

Please call the travel office (6-3100) to assign your TMC (travel agency), to assign your approvers for both Request and Expense and to set up your delegates and travel arrangers.

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.

Call the travel office to discuss other options like remote employees who never log into UO computer platforms for Concur submit solutions.

Concur Delegates

Concur Resources: Concur Training Videos: <https://ba.uoregon.edu/content/concur-training-videos>

Q: What is a Concur delegate?

A delegate is someone who can work on behalf of an employee to set up Request and Expense reports, attach support documentation or upload receipts. A Travel Arranger is a secondary delegate permission that allows employees to book on behalf of a traveler.

Q: How do I become a delegate for a traveler?

The traveler can log into his profile and in the upper right hand corner, click Profile Settings. Under Request Settings or Expense Settings, click the Delegate link (this is the same function) and start typing the name of the Delegate. Select from the results and click Save. Give permissions by clicking “Can Prepare”, “Can View Receipts”, “Receives Emails. The travel office can also set up delegates and travel arrangers for a traveler.

Q: How do I set up a Travel Arranger?

In Profile Settings go to Travel Settings, Assistants/Arrangers. You can assign any number of Travel Arrangers but only one is the Primary Arranger and receives emails.

Q: I am a delegate for a traveler, may I submit the request (or expenses report) on their behalf?

No. Request and Expense reports must be submitted by the traveler as they are required to review and sign to the required legal statement. When working as a delegate for a traveler, the submit button says “Notify Employee”. The traveler will receive a Concur email to let them know the report is ready to review and submit.

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 backup person who can work on behalf of a traveler.

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 Approvers

Concur Resources: Concur Training Videos: <https://ba.uoregon.edu/content/concur-training-videos>

Q: How is the approver role determined?

Approvers are determined by your department administration. Consider best business practice as the approver should be someone to whom the traveler answers and/or has budget authority. While Concur recommends one approver for Request and one for Expense, departments can choose up to two levels of approval. Someone who is not readily available to their computer or mobile app might choose to delegate their authority to someone who is more available for this function. Documentation should be maintained in the department to track this delegation, as the person who delegates still retains the approval responsibility.

Q: How do we know who the approver is for our department or a particular traveler?

Each Concur user needs at least one Request approver and one Expense approver. In Profile Settings, see Request Approver or Expense Approvers links. You can also click on the Approval Flow tab in Request or in Expense under Details, Approval flow in Expense to see who is assigned to that report.

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

Yes.

Q: The Traveler's Request was approved, does Expense also need to be approved?

Yes, the Request provides an estimate of expenses. The Expense report is the final accounting and payment process.

Q: What if the approver is out of the office?

If the approver has internet access, they can approve from their Concur mobile app or computer. Otherwise, a backup approver can be assigned to the traveler permanently or for a limited duration date range.

Q: If our usual (default) approver is on leave or vacation, can they assign a backup approver?

Click on Profile Settings and then on Request or Expense Delegate. Be sure your back up approver is in your list of delegates and add if necessary. For an ongoing back-up, click on "Can Approve" and "Receives Approval Emails". For limited duration, click on the date range for the back-up and Receives Approval Emails.

Concur Tips: ["Setting Up your Concur Backup Approver"](#)

Q: How do I act as a back-up approver?

Upon receipt of the email alerted a report requiring approval, log into Concur and act as the delegate for the primary approver. Click on Approval in the top black navigation bar, review and approve or return.

Q: I am sharing costs with another department, how do I allow for all Travel Expenditure Authorities to approve?

Expenses can be "allocated" to multiple indexes by clicking on the Allocate button. You may allocate by either percentage or dollar amount. The Expense report must be approved by each index approval authority. The approver assigned to the traveler can use the "Approve and Forward" button to send to the second approver. Enter Comments to Approver, preferably in capital letters to the new approver explaining why you are forwarding.

Q: Can a budget authority approve their own travel?

A traveler can never approve their own travel. Every traveler needs to have an approver assigned for their Requests and Expense reports and this person should be someone to whom they report.

Q: Who can see completed expense reports?

Traveler, delegate, approvers, processor, audit roles.

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

Concur Travel Manual Step-by-Step: <https://ba.uoregon.edu/travel/concur>

“Create a Request”

Concur Request is a pre-travel approval required **before** booking air in the booking tool. Once your Request has been approved and you are ready to book, locate the top black navigation bar and click on Request. Locate your BOOK button in the Action column (far right side) to launch the search you already entered and to reserve a ticket.

TMC Assist bookings require that you send the travel agency the approved Request by clicking on the Print/Email button and either create a PDF to send via email or click the Email button and send to the TMC ticket queue email address that appears at the top of the report. Be sure to also enter your own address to receive for tracking purposes.

Q: What is the purpose of a Concur Request?

- To provide the department budgetary planning
- To provide the department visibility of employee absence and to coordinate teaching, advising and other staff coverage.
- Request feeds travel date and destination information to Concur Locate to fulfil UO’s Duty-of-Care to employees and students. In case of emergency, weather event, or natural disaster UO Risk and Safety is able to contact and provide emergency assistance to UO travelers.

Q: I have entered in the details of my travel in the header. Why can’t I submit?

There must be at least one expense entered in one of these tabs to submit the Request. Note the tab for Segments (Air, Rail, Car, Hotel icons) and a tab called Expense Summary. Click on each tab and enter one or more expenses. **Important:** The Segment information will pre-populate the booking tool search if you choose to book your travel in the booking tool. **Be sure to carefully select the correct dates, airport and travel times.** If your Request is approved for the information entered and you to make changes when booking, Concur will assume you need to be re-approved and will present a new Request button.

Q: I only want to book Air right now but may want to add car rental or hotel later. How do I do that?

Enter all the components in your request. You will be presented with a Skip Car, Skip Hotel option when booking your air and will be able to return at a later time and add these segments. If you do not have these expenses entered in your Request, you will need to create a new request for approval to book.

Q. What if my air price changes from when I first started my request?

Check with your assigned Request approver. Many departments have \$50+/- flexibility. Some departments will require that you seek re-approval for any increase over that amount. An email documenting the increase and approval can be attached using the Attachment button. Remember that airline prices are subject to change until ticketed (not reserved).

Q: What if I need to change or modify a Request?

Prior to approval: Request can be Recalled and adjusted.

Post approval: If the request has already been approved and air has been purchased, determine if the change is for personal or business related reasons. If personal, call the TMC to complete the request providing a personal credit card for the change fees. If there is a business reason for the change, determine the cost with the TMC and document the reason in an email to the Request approver. Once the approver has emailed approval of the additional cost, attach to the Request using the attachment button to provide an audit trail. Forward the Request to the TMC using the Print/Email button or via email with a pdf of the detailed report including a note stating the cost is approved by NAME.

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

Q: Does Request provide a list of allowable expenses?

Request is a tool to estimate and contains an abbreviated list of reimbursable expenses. The Expense report used for reimbursement provides a more complete list.

Q: Can you Copy a Request for reoccurring trips?

Yes. Go to the top black navigation and click on Request. You will either see your former active Request or click on the blue View button to view more requests. Click on the check box to the left of the Request you want to copy. The copy button in the upper right "lights up". Click Copy Request. Add new Request name and date, fill in all other mandatory fields and click OK to create a Request copy.

Q: Do I enter a Request when all my expenses will be paid by a hosting entity/institution?

If the entire trip is to be funded through another entity, select Trip Type \$0 Dollar Trip. Completing a Request visibility of the trip to the department provides Concur Locate information to Risk and Safety.

Q: How are student travel requests completed?

If the student is traveling for their personal benefit (participant support), use Guest Policy and select Trip Type: #3 UO Participant Support Travel. This will charge the airfare to 55105 in their expense report. If the student is performing a service for the UO like presenting research at a conference, or for their UO employment, use the regular UO Travel (employee) policy. For expenses other than air, Participant Support (55105) payments are issued in banner. Employee travel must be processed in Concur.

Q: Which Traveler Type do I use for a GE?

If the traveler is traveling for their paid position, they are considered Staff. If the traveler is traveling on behalf of their education, they would be considered a Student.

Q: My Request is still in my list as Active but I submitted by Expense report. What should I do?

Request will remain active for 45 days after the end of your trip, in case you found other expenses you forgot about. You can inactivate it by clicking on the Request to open it and then click on the Close/Inactivate button. You may also cancel a request for which you will not be filing an Expense Report.

Q: My request has disappeared. Where is it?

If your request has not been accessed in 45 days, it will automatically go inactive. Expense reports can be created as soon as you see the Expense button in the Action column. If you need to reactivate your request, you can locate it by clicking on the blue View button in the upper left. Call or email the Travel Office with the four digit Request ID to reactivate. Request never goes away and are forever in your archives.

Q: How do I delete a Request?

Click on Request in the top black navigation bar. Locate desired Request and click on the line to open. Locate the Delete Request button in the upper right of the screen. Requests never completely go away. To view a closed, withdrawn or older Request, click the blue View button in the upper left. Select desired filter to view all previous requests.

Concur Travel (Booking Tool)

Concur Travel Manual Step-by-Steps: <https://ba.uoregon.edu/travel/concur>

“Booking Travel from an Approved Request”

“Notify the TMC of a Request Approval”

“Adding Hotel or Rental Car to an Approved Request

Q: What is the Concur Travel booking tool?

Concur Travel is a robust booking tool providing travelers or their delegates with Air, Rail, Car and Hotel booking options. 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 and trips including personal time for which business only comparison quotes are required.

Q: What if a traveler requires a Multi-City itinerary or an international itinerary?

The Concur booking tool can 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: Can I start with the Booking tool in Concur?

You can explore pricing on the booking tool but you must have an approved request in order to ticket. UO’s process is to complete the Request for approval, then book the travel.

Q: What if I want to include personal time in my itinerary?

The UO can pay up to the lowest of either personal or the business itinerary. A comparison quote for the business only itinerary must be prepared to determine the most economical option. Use the booking tool or the travel agency, depending on how you plan to book. Attach both the personal itinerary and the business only quote using the Attachment button in Request. If your personal itinerary is more expensive, you are responsible for the difference.

Split Ticket: Check with the Travel Agent to determine if the airline will allow a split ticket and provide your personal credit card for the difference, plus the split ticket fee. If the airline does not allow a split ticket, the personal portion must be itemized on the Expense report for the trip. The “Comments to the Approver” box should contain notes about your personal expense so that Expense report can be reconciled correctly.

Q: How do I book a rental car when I include personal time? Can I use the booking tool?

The State of Oregon contract/discounts are for business travel only and cannot be used for personal travel. If the traveler chooses to rent from Hertz, Enterprise or National, call or email the TMC, or book online for a non business rental. The booking tool can be used for other car companies for which the State of Oregon does not contact (companies other than the three listed above.)

Q: Can I make reservations for the conference hotel through the booking tool?

No, conference hotels should be booked using the instructions on the conference website. These contracted rates are only available for attendees. Email the reservation confirmation to plans@concur.com to sync up with the rest of the travel reservation in your Trip Library.

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. Call the assigned TMC to request they enter the Direct Bill number into the car segment. The TMC has departmental direct bill numbers on file.

Q: How do I know that my Concur booking is finalized?

Click on the Travel tab and look for Upcoming Trips or Trip Library. Click on the trip to locate the 11 digit ticket number to confirm the ticket has been issued. This normally happens 5-45 minutes once the trip has been requested.

Q: What if I need to cancel my trip?

Call the airline or the travel agency directly to cancel your trip prior to the departure in order to obtain any credit for future travel. The travel agent will review what credit might be available, when it needs to be used and who can use it. ***Do not use the cancel button within the Concur booking tool.***

Q: What happens to cancelled/unused tickets?

An unused ticket credit will show on the Travel tab for the traveler. Arrange this booking directly with your TMC to do the ticket exchange to use existing credit. Alert the agency if there is a credit that will not be used so they can check fare rules and use it for other UO business travel.

Q: If an airline ticket booked through the booking tool is cancelled by the airline, where do I go for help?

You can avoid customer service lines or long waits on hold by calling the TMC for assistance. For weather cancelations, airlines often issue "weather waivers" to waive change fees or offer full refunds. The TMC will go over your options. For mechanical or crews issues, airlines may offer flight refunds, hotel and meal credits.

Q: How are airline tickets paid? What about hotel?

The TMCs hold a UO "lodge" card used for pay for airfare or rail booked either on the Concur booking tool or by calling the agency. The lodge card is only for transportation. The card may be used to guarantee a hotel but if a deposit is required, you will need to call them with your corporate One Card or a personal credit card.

Q: Can a traveler book flights on their own using their own credit card?

In the memo to campus dated March 2018, Pres. Schill provided guidelines requiring UO business travelers to use the Concur booking tool or call our UO TMCs in order to take advantage of contracted UO airline discounts and rebates. Airfare is charged to the UO lodge card.

[Pres. Schill's memo](#)

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. When booking offline reservations (i.e. conference hotels), email the reservation confirmation to the traveler's profile at plans@concur.com entering their uoregon email address into the subject line of the email.

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: When booking a guest, do we need to provide date of birth and gender?

Yes. 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.

TMC – Travel Agent Assist booking

Review these step-by-step instructions for working with your travel agent partner: [“How to work with a TMC”](#)
Your travel agent is a great resource of travel and airline information and can help you make the best purchasing decisions.

Q: How does my travel agent know to ticket?

When you work directly with your travel agent, you or your delegate must email a copy of the approved Request so they can charge the UO credit card and finalize your ticket. Go to the Request header and click the Print/Email button. You may either email this report or create a pdf and send in Outlook. **NOTE:** At the end of the day, creating and attaching a pdf is recommended. Concur emails often “batch” with a possible delay in the TMC receiving the email. If emailing within Concur, always add your own address for tracking. See Concur Travel Manual Step-by-Step: <https://ba.uoregon.edu/travel/concur> “Notify the TMC of a Request Approval”

Q: I am flying on federal grant funds. Should I use the TMC for my air?

Our TMCs are experts on Fly America policy restrictions and Open Skies Agreement. They can help book a correct ticket for grant fund payment or assist with comparison quotes or statements for your exception form.

Q: Can the TMC accept a personal credit card for purchases?

Air is purchased using the UO lodge card. For personal travel, the TMC will accept the traveler's personal credit card for their portion.

Q: What if I want to travel with my family?

The TMC will create reservation for you with all family members on one booking so you will be accommodated together in the case of reseating or a flight change. Send approval of your business travel from Concur to the agency and provide your personal credit card for your other family members.

Q: What if I am including personal time and my ticket is more expensive than the business ticket:

See information above regarding airfare including personal time and Split Tickets.

Concur Expense

Concur Travel Manual Step-by-Steps: <https://ba.uoregon.edu/travel/concur>

“Create an Expense Report”

“Provide Business Purpose for travel”

Q: What is Concur Expense?

Concur Expense is used to reimburse travelers for business travel expenses. Lodge card (TMC transactions) and One Card credit card transactions flow in nightly through the bank feed. Additionally, vendor receipts will flow in nightly to the list of Available Expenses. It is advised for you to turn on E-Receipts in your Profile settings. Otherwise, they can be captured on the Concur mobile app or uploaded electronically. Expense reports are approved electronically saving time and paper.

Q: When do I have to submit an Expense report?

The IRS Accountable Plan requires expenses to be claimed within 60 days of the completion of the travel. Concur will send a reminder starting 14 days upon your return. If you have not completed a report within 45 days, the emails stop and the request is inactivated.

Q: When do I start my Expense report and how do I start my Expense report?

When: Your Expense report should be started as soon as you know you are going to travel. You can add your lodge card charges for air, any registration or prepaid expenses. This will give you easy Concur mobile app access to attach receipts and add additional expenses while waiting at the airport.

How: Click on REQUEST to locate your approved Request and the “Expense” button on the right side in the Action column. Review the header information and make any changes, click the Next button. Build your Travel Allowance for your meals and hotels, click Create Expenses. Add additional expenses and receipts as needed.

Q: What if I can't see my Request?

Click on the blue View button in the upper left of the screen and select from the drop down menu. View All will show you all the Request you have ever created. Requests never leave the system.

Q: What is the list of Available Expenses?

This is information that flows in nightly through the bank feed and receipt feed. [Check the icons](#) – these might include airfare and agent fees charged to the lodge card, One Card charges, and receipts from Concur partner vendors. In your report click on the “Import Expenses” button to move all applicable charges and receipts to the report you are building. An expense report should include ALL the expenses associated with that trip.

Q: I accidentally assigned the wrong lodge card/One Card expense to a report. What do I do?

Highlight the line item and click delete. This move the expense back into your list of Available Expenses to be assigned to a different Expense report. You can never completely delete a credit card charge. It must always be assigned to a report for reconciliation.

Q: I took pictures of my receipts, where are they?

You will see your receipt images when you navigate to the top black navigation bar and click on the Expense button. See Available Receipt section to view available receipts. When preparing an Expense report you can click on Import Expenses to see electronic receipt or you can click on the Receipt button (under the report name, upper left side) and click View Available Receipts to see uploaded images or click Attach Receipt Images to attach a scanned receipt from your computer drive.

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, slowing down processing time.)
- 2.) Cell Phone: 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 in your Concur profile. If you need the receipt to go to a different person, enter their uoregon email address in the subject line of the email.
- 3.) Concur Mobile App option: click on the app and locate the camera icon labeled “Expenselt”. Snap a picture, be sure it is legible, and click “retake” or “done”. The receipt will automatically load to your receipt gallery. Hotel receipts will automatically itemize for your report.

Q: How do you upload additional documentation – conference, grant information, travel logs, etc?

Use expense type “Other Supporting Documentation” or “Conference Info and Agenda” and click “Attach Receipts” to upload additional information. Do not upload receipts at the header using the Receipt button.

Q: How do I delete receipts from an expense report header level?

- Click on the receipts drop down menu in the expense report.
- You will see “Delete receipt images”, click this option.
- Confirm that you want to delete receipts from the report level. Click yes.
- This leaves the expense level receipts in place.

Q: When the receipts are in a foreign currency, do we need to upload the OANDA currency conversion printout into Concur?

No, Concur will convert the receipt based on the location entered into the report. Receipts should still be translated into English to indicate the expense.

Q: Can I average hotel cost per night when some nights are low and some are higher?

Yes, use the Additional Information field to explain.

Q: Do hotel charges have to be itemized?

Yes. The definition of hotel expense for domestic travel is base rate plus tax. The definition of hotel expense for foreign travel is the nightly total including tax. Other expenses including room service, parking, internet etc. must be itemized to code to the correct account code.

Q: How are per diems calculated?

Concur uses the GSA per diem tables to determine reimbursable amounts for lodging and meal per diem for the 48 contiguous US states. Alaska and Hawaii, territories and possessions are administered through the Dept. of Defense and international destination are set by the Dept. of State. These tables are coded into Concur and your report uses the Travel Allowance section to indicate the business location and dates.

Q: What is Travel Allowance?

The Travel Allowance builds the GSA (General Services Administration) per diem tables within Concur and populates the meal and lodging per diem s into your report. When you start your report, a window will appear asking “Will this report include Meals or Lodging?”. Answer yes, to create the travel dates and business location for your reimbursement. When building the itinerary remember the trick is “Save, Save, Next, Next” to get to the meal per diem table.

Q: How do I enter a single day meal?

Single Day meal fringe benefit is to be entered by your department’s payroll administrator during time entry, not in Concur.

Q: How do I find the GSA per diem allowance?

If you have built the Travel Allowance in the report, go to Details, Travel Allowance, Reimbursable Allowance Summary for hotel limit and Expenses & Adjustments for meal allowance. For pre-trip planning you might view the GSA per diem tables: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Q: How are travel day meals calculated?

The UO follows the IRS recommendation of 75% of the full allowance on the beginning and end travel days.

Q: Can I include single day overtime meals on my Concur expense report?

No, these are processed by your Payroll time entry clerk as a taxable fringe benefit.

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/UO Card/Non Reimbursable” and the amount is deducted from the reimbursement. If foundation funds are being used to reimburse, process a foundation 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. If the Outside Source is paying for airfare, select Airfare – Paid by Outside Source A3103 to set up the receivable for the payment to the UO.

Q: How should a Mileage reimbursement be entered?

If a single line item, find Personal Vehicle Mileage in the Expense Type list. Enter the transaction date and click on Mileage Calculator. Enter starting address (if home or work this must be the closer of the two) and the destination. Click these buttons: Calculate Route, Make Round Trip, Add Mileage to Expense.

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.” Enter the total of the mileage being claimed and in Additional Information enter “See Mileage Log attached”.

Q: For recurring mileage trips, how should I enter my Expenses?

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 provides a Request copy feature for regular trips to the same location or same business purpose.

Q: If a traveler uses Motor Pool, is there a place on the form to note that?

If there is no expense, you do not add it to the report. You could provide a note of explanation in the business purpose/additional information field.

Q: If a default index is required, can it be changed?

Yes. And expenses can be allocated to any number of indices either at the header for the entire report or on each expense line items.

Q: How can you override an account code?

Account codes are assigned to each Expense Types and Trip Types. Review both boxes for the correct setting.

Q: How can I see a summary of my report? How can I print my report?

Under the name of the trip (upper left side), click on the Print/Email button. This report summarizes the report information, the accounting and the amount being paid to the traveler or going to clear the One Card or lodge card receivable. You may create a pdf of the report, print or email the report.

Q: What are the warnings or exceptions on my report?

The yellow caution triangle is simply a reminder or a warning that there may be a date issue or possible duplicate entry. You can review the note in the Exceptions box at the top and move on. A caution will not stop you from submitting your report. A red exclamation point is a hard stop. These typically show up when you are creating a report pre-trip or if you have a required field box that is empty. Review the note in the Exceptions box at the top to see what needs to be done to move forward.

Q: How do you limit an approved amount on an expense report?

Personal credit card: If the amount is greater, 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/UO Card/Non Reimbursable" to reduce by the desired amount.

Itemize: Itemize a line item into business and personal expense by clicking the Itemize button in the line item worksheet. Enter the amount to be claimed as a UO business expense and label the amount that is the traveler's responsibility to Personal/OneCard/Non Reimbursable.

Concur Locate

Q: What is Concur Locate?

Concur Locate provides global duty of care to all UO travelers. Concur Locate allows UO Office of Risk and Safety to prepare, monitor and assist travelers, providing a multinational response in cases of security, natural disaster, weather events, airline service disruption, etc.

Q: How does the UO reach me in case of emergency?

It is important to provide your cell phone number and emergency contact information in your Concur profile.

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 for the traveler. 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. Information about the program is available on the UO Travel website on the US Bank One Card button <https://ba.uoregon.edu/travel/us-bank-one-card>

Q: How can I get a One Card?

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: How long does it take to get a One Card?

US Bank One Card applications are processed about once a week and arrive in 5-7 days. In an emergency, we can get a card for a traveler in about 3 days.

Q: Who qualifies for a One Card?

Any UO traveler who has an appointment of .5 pr greater, travels for UO business and is approved by their department may apply for a One Card for travel expenses. The program is available and encouraged for infrequent travelers.

Q: Can the One Card be used for meals?

One Card can be used for meals but they must be marked as Personal/OneCard/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: Is 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 load onto the traveler profile with little manual entry. The charges are paid by the UO so travelers do not incur interest nor do they need to pay a bill.

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. All expenses must be assigned to an Expense Report. Accidental personal expenses or Foundation expenses or otherwise non reimbursable expenses are marked Personal/UO Card/ 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.

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.

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 personal cards will not be linked to Concur. Expenses using personal cards must be entered manually.

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

- 1.) **Amounts 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 General Information and Tips

Q: OK, I'm logged in, now what?

Use the black bar at the top of the screen to navigate. You only need to remember to use the Requests, Travel and Expense buttons. The rest of the screen is informational or alternate ways to get to the same place. Stick with the top black navigation bar if you are a new user.

Q: I can't remember what to do!

99% of the time you will always start with the Request button. Your approved Request is used to launch the booking tool and used to launch your Expense report. **Start in Request to:**

- Create a Request
- Locate the Book button to use the Booking tool to book air, car, hotel
- Create your Expense report for an approved trip.

Q: I seem to be lost in my Concur screen. Help!

Click on the SAP Concur logo to reset your screen to the home page.

Q: Help me!

***** Call or email the UO Concur/Travel support desk at 6-3100 or travel.uoregon.edu early in your process if you get stuck or have questions.**

Concur Mobile App

Concur Resources: Concur Training Videos: <https://ba.uoregon.edu/content/concur-training-videos>

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: How do I install the Concur mobile app?

From your computer, sign into Concur.uoregon.edu.

- In the upper right corner click on Profile and then on Profile Settings.
- Click on Concur Mobile Registration link. (Do not click get started button). Your UO email should auto-populate.
- Under Set up PIN for Concur Mobile, create a PIN (use a simple 4 digit number)
- Click Set Concur Mobile PIN. (This will be a onetime PIN password to activate the app).
- On mobile device, download the SAP Concur app from your app store.
- When you launch the app, 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 your UO password)

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. You will want to download Triplt Pro for on the go travel alerts.

Q: Is there a charge for apps associated with Concur mobile app or Triplt Pro?

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: 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.

Triplt Pro

Q: What is Triplt Pro?

Triplt Pro is a mobile download free to UO business travelers that 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 and features Waze, a GPS tool. Reservation confirmations can be emailed to plans@tripit.com and Triplt Pro instantly creates a master itinerary for each of your trips.

Download directions:

- Login to concur.uoregon.edu and visit the App Center menu top right. Triplt should be listed under popular connections.
- Click on Triplt. A page will load with a button to 'Connect'.
- A pop-up will display asking you to activate your Triplt Pro Subscription with @uoregon email address displayed, choose new password, select country, and accept user agreement.
- Accounts Linked notice will display with options to Continue, or click Tripit Mobile button if already on mobile device to take you to app download.
- Download the App from your app store, install, then Sign in using the password you just set.

Concur Reports

Concur is the system of record for UO travel expenses. All expense reports are always accessible and can be printed if necessary to include receipt images. Standard reports are available with Expense Processor Audit permissions. If you have this role, you will see a Process Reports button when clicking on Expense in the top black bar. This will allow you to query reports based on any number of criteria: date range, traveler, group, etc. Some departments might require more involved reporting involving Cognos or IDR. Contact the travel office for consultation.