

From: travelnews-bounces@lists.uoregon.edu <travelnews-bounces@lists.uoregon.edu> **On Behalf Of**
BAO news for travel administrators
Sent: Sunday, April 1, 2018 3:08 PM
To: travelnews@lists.uoregon.edu
Subject: travelnews: Concur - Assignments, Workflow, Guest Travel, Help and Training

Good Afternoon –

By now you have logged onto Concur (concur.uoregon.edu) and had your travelers assign you as a **delegate** and as a **travel arranger**. As a travel coordinator, you have an administrative role assigned to you so you assign approvers for Request and approvers for Expense. (Travelers cannot assign their own approvers.) For instructions see previous travelnews emails and information on the Concur Project webpage: <https://ba.uoregon.edu/content/concur-project>

Concur Workflow:

Request – (Click "Requests", then "New Request") A pre-travel approval is required to:

- o Provide location information to Concur Locate for UO duty of care requirements.
 - o Launch the booking tool
 - o Start an Expense report
- Request must be electronically approved by assigned approver to Book travel.

Booking Travel: (Click "Travel")

- o Use the Booking tool to book Air, Rental Car, Hotel or contact the TMC direct (Travel Mgmt Companies – Direct Travel or Premier Travel).
- o Benefits: You are in control of your reservation, lower \$5-\$9 ticket fee when using the booking tool, Fly America compliant for federal grant travel, all flights changeable with airline fee, university discount applied to the ticket price. (Tickets booked on the booking tool are ticketed by the TMC.)

Expense: (Click Expense)

- o Travel reimbursement – electronic receipts and signatures and approvals saving time and paper. Concur partner vendor receipts flow directly into traveler's profile.

Optional:

- o **One Card** – corporate pay credit card, paid by UO. No worry about paying your bill on time or waiting for your reimbursement. Application on forms.uoregon.edu (go to Business Affairs, Travel for application)
- o **Concur mobile app** – Take pictures of receipts and upload to expense report, electronic review and approvals
- o **TripIt Pro** – Free for UO travelers. Itinerary organizing app with real time flight alerts plus Waze GPS - traffic alerts/alternate routes.

Guest Travel:

If you have a guest who makes multiple trips for the UO, the Travel Office will set up a profile for them in Concur. For travelers you will only work with one time, we are piloting and validating several processes to determine the most effective and streamlined. More information will be made available within the next few weeks.

In the meantime, you can continue to use Duckweb to reimburse expenses for onetime guests.

Questions?

- * Concur Project website for FAQs, training opportunities, and other information. <https://ba.uoregon.edu/content/concur-project>
- * Drop in workshops several times per week
- * UO Portland training, Monday, April 2
- * UO Traveler training (Delegates welcome too!) April 9, 16, 25, 30 <https://ba.uoregon.edu/content/travel-training>
- * Call or email:
 - * Laurie: 6-3158 lajacoby@uoregon.edu
 - * Brooke: 6-3445 bmillett@uoregon.edu
 - * Sandy: 6-0812 sbooker&@uoregon.edu
 - * Brian 6-2387 bstrait@uoregon.edu

Travel Policy and Concur training, this Wednesday, April 4 from 8:30am - 2:30pm (new day!) This is the regular bi-monthly travel training and is another opportunity to review IRS and UO Travel policy, plus a Concur demo. Register on My Track: <https://uomytrack.pageuppeople.com/learning/2109>

Have a nice week,

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