

From: travelnews-bounces@lists.uoregon.edu <travelnews-bounces@lists.uoregon.edu> **On Behalf Of**
BAO news for travel administrators
Sent: Tuesday, April 10, 2018 9:57 AM
To: travelnews@lists.uoregon.edu
Subject: travelnews: Important Concur Tips *** plus drop in sessions. Please pass these onto your travelers

Good Morning –

You are all doing a marvelous job embracing Concur, nice work!. Here are upcoming drop-in work sessions. No registration required:

Drop In Sessions - Concur Travel and Expense: TUC, Room 305

Concur Travel Drop In Session, TUC, rm. 305	4/9/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/10/18	9:30 - 11:30
Concur Travel Drop In Session, TUC, rm. 305	4/12/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/13/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/16/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/18/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/20/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/23/18	8:00 - 4:00
Concur Travel Drop In Session, TUC, rm. 305	4/24/18	1:30 - 3:30
Concur Travel Drop In Session, TUC, rm. 305	4/25/18	2:00 - 4:00
Concur Travel Drop In Session, TUC, rm. 305	4/26/18	2:00 - 4:00
Concur Travel Drop In Session, TUC, rm. 305	4/27/18	1:30 - 3:30

Concur Travel and Expenses Tips of the DAY:

URL: concur.uoregon.edu. Log in using your UO credentials. If you are unsuccessful logging in, after four attempts, Concur will suspect phishing and block your account for 24 hours.

Browser: Chrome seems to work best.

If you get lost or need to reset, clicking on the SAP Concur log in the upper left corner will take you back to the home screen.

Set Up:

Traveler profiles: Name, 95#, Date of Birth, Department address, and UO phone number are already populated in each employee's Concur profile. Do not retype or change as these will be overridden with each nightly upload.

Optional: Default Index (enter the primary department for whom travel takes place), emergency contact information, frequent flyer numbers and hotel/car membership info, TSA number, passport (Concur will alert you when your passport is due to expire).

Delegate set up: Do not click the “Can Submit” boxes! Travelers must always submit their own reports. Delegates never submit on behalf of a traveler. Your button should say “Notify Employee”.

Delegate plus Travel Arranger: If your delegate will also book travel, be sure to assign them the Travel Arranger role as well as Delegate for Request and Expense.

Change TMC (Travel Management Company): Travel Office maintains admin rights to change TMC assignment. Use the form available at forms.uoregon.edu. Our UO TMCs are Direct Travel and Premier Travel.

General Tips:

ALWAYS START WITH REQUEST:

- To create a pre-travel Request
- To locate the Action column “**Book**” button to launch the booking tool
- To locate the action column “**Expense**” button to start the reimbursement

Booking Tool:

LOOK BUT DON'T BOOK!

- Use the booking tool to look up your airfare price to fill in request. Do Not Book.
- Click Request and fill in the Header, Segments and Expenses. For “How will I book my trip”, select either #1 Online Concur Booking Tool. **Important: If you are not using the Booking Tool, select any other option.**
- Upon Approval, click Request and in the list of Active Requests, locate the Book button.

NEW! Ghost card (credit card held by TMC to ticket air and is the default card on all UO Concur profiles) can be used to guarantee hotels booked in the Concur booking tool
TMCs (UO Contract agencies) do ticket fulfillment when using the booking tool.

Business Purpose:

The header in Request and Expense was designed to require business purpose in both places. Request is often input 2-6 months prior to travel and is often a very simple, not fully developed outline of a trip. The Expense business purpose should provide the full details that would meet IRS Accountable Plan requirements to demonstrate business benefit to the UO of the travel and should stand up under audit scrutiny.

Meal Per Diem/Travel Allowance:

Concur calls Meal per diem Travel Allowance. When you save an Expense Report header, the box asks if you are including Meals and Lodging. Click yes, and fill out the itinerary. Each page is an entire travel day itinerary including both departure and arrival time.

Remember: Save, Save, Next, Next

After the initial travel day itinerary input, click Save. After the final travel day itinerary input, click Save

Then click Next, and Next to create the grid. If you need to go back to review, locate Travel Allowance options in the “Details” link

All meals are assumed: Check boxes to indicate meals that were provided and consumed and to remove. If all meals were provided, GSA allows an incidental to be claimed. Check the box to Exclude All if not claiming any expense for the day.

How to Go Back to sections of Expense:

Click “Details” to review the header information and the Travel Allowance information.

Per Diem for International and US Possessions, territories, Alaska and Hawaii:

These per diems have not changed and are established by Department of Defense for US Territories and possessions, Alaska and Hawaii and by the State Department for International destinations. For budget planning, see the Travel website – Travel Resources for the tables.

Attaching Conference or other supporting documents:

Request: Upon clicking Save, a button lights up called Attachments. Click and upload. **Pop-up blocker:** To view your attachments click on Attachment button and see "view attachments in a new window". If nothing appears, you probably have a pop-up blocker. You will need to adjust your browser settings so you can view pop-ups from Concur.

Expense: On the list of Expense Types, find:

- Conference Info and Agenda
- Other Supporting Documentation
- Other Documentation/Airfare Comparisons

Click “Attach Receipt” on each line item to upload the documents

Download the Mobile app:

- Log onto your Concur profile using your UO credentials
- In the upper right corner click on your name and then on Profile Settings
- Click on Concur Mobile Registration
- Click on Create a Concur Mobile PIN
- Click Set concur Mobile PIN. (This will be a onetime password to activate the app).
- Install the SAP Concur app on your mobile device and 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) and sign in



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