

Mark McCulloch

From: travelnews-bounces@lists.uoregon.edu on behalf of BAO news for travel administrators <travelnews@lists.uoregon.edu>
Sent: Monday, July 2, 2018 2:55 PM
To: travelnews@lists.uoregon.edu
Subject: travelnews: CONCUR - Reminders, tips, important info and July Drop In Work Sessions
Attachments: ATT00001.txt

Good Afternoon Concur Users and Delegates:

Please review these important tips.

Requests:

- **Personal Time** - please remember that you must include a business only comparison quote for travel which includes personal time. If your personal travel itinerary is more expensive than the business only and a split ticket is required, attaching the comparison quote provides information to your departmental approver and to the TMC (Travel Management Company) to demonstrate the correct amount to be charged to the UO Lodge (credit) card. If a split ticket is required because your personal time increases the cost, contact the TMC with your personal credit card. When completing your Concur Request, attach both business only and personal quotes using the **Attachments** button (see below). Remember that you may not be reimbursed for any expense related to your personal travel, nor may you use the State of Oregon discounts including any car rental or hotel discount programs.

The screenshot shows a Concur Request form for a 'Personal Time' request. The form includes the following fields and options:

- Request Name - Destination, Date:** Personal Time Sample
- Business Purpose:** Sample to show attachment.
- Request Policy:** Request Policy
- Request/Trip Business Start Date:** 08/01/2018
- Request/Trip Business End Date:** 08/08/2018
- Destination City:** Boston, Massach
- Will you book your trip?:** inline Concur Booking Tool
- Does this trip include personal travel?:** Yes
- Personal Dates of Travel:** Aug 1-4
- Will you be absent summer?:** No

Expense Reports:

* **Znotused** - Anytime you see ZNOTUSED as a dropdown option, please DO NOT USE. In each line item on an Expense report, the payment type defaults to Cash/Personal Credit Card. Do not change the default. If you need to indicate an expense has been paid by an outside source, choose **Expense Type**: Personal/Outside Source Funded.

znotused TEST

+ New Expense Import Expenses Details ▾ Receipts ▾ Print / Email ▾

Expense Type	Date	Amount	Exception
Personal/Non ...	05/24/2018	\$1,253.41	⚠ This report contains expense(s) outside of the trip dates, please review for accuracy.
Meal Per Diem	05/28/2018	\$48.00	⚠ This report contains expense(s) outside of the trip dates, please review for accuracy.

Expenses Move ▾ Delete Copy View ▾

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested	Expense Type	Transaction
<input type="checkbox"/>	06/01/2018 ⓘ	Parking	\$50.00	\$50.00	Personal/Outside Source fund ▾	06/01/20
<input type="checkbox"/>	> 06/01/2018 ⚠ ⓘ	Hotel La Quinta, Eugene, Oregon	\$250.00	\$250.00		
<input type="checkbox"/>	06/01/2018	Meal Per Diem Portland, Oregon	\$48.00	\$48.00		
<input type="checkbox"/>	> 06/01/2018 ⚠ ⓘ	Hotel Best Western International, Portl	\$600.00	\$600.00		

Use Expense Type: Personal
Expense
Expense Type
Personal/Outside Source fund ▾ Transaction
Comment

Guest Expense Reports:

- **Guest Travel** - When submitting an expense report for a one time Guest using your own profile, be sure to select the **(1) Guest Policy** in the dropdown menu, and use the **(2) Guest's name, Destination, Date** as the Report/Trip Name. You must fill in the **(3) Vendor ID number** so that the payment goes to the Guest and not to you. Please enter the number **exactly as it appears in banner** with no spaces and using all digits. If the traveler has a V# and a 95#, **please use the 95#**.

Report header for: GUEST NAME, Eugene May 20

Policy *Guest Policy		1	
Report/Trip Name GUEST NAME, Eugene May 20	Report/Trip Business Start Date 5/20/2018	Report/Trip Business End Date 05/22/2018	Report/Trip Purpose Candidate
Trip Type 1 Domestic Travel	Does this trip include personal travel? No	Personal Dates of Travel	Vendor ID V0002300
Non Resident Alien? No	Business Purpose Interview visit for ABC position	Comment	
Index (SBADIR) SBADIR BAO Director-(Banner Activity Code	Banner Location Code	Report Id 9780B42AFBC047A1B03D
Report Currency US, Dollar	Approval Status Not Submitted	Report Total 154.14	Personal Expenses 150.00
Amount Not Approved	Amount Approved	Amount University Paid	Amount Due University

- **Guest Meal Per Diem** - Use Guest Meal per diem under "New Expense" to reimburse for allowable meals. Use the GSA table to determine appropriate amount, enter into Expense line with a note explaining calculation.

GSA Meal Per Diem Chart: <https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup>

Meal Breakdown tables: <https://www.gsa.gov/travel/plan-book/per-diem-rates/meals-and-incidentals-expenses-mie-breakdown>

GUEST NAME, Eugene May 20

+ New Expense

Import Expenses

Details ▾

Receipts ▾

Print / Email ▾

Expenses

Move ▾

Delete


Copy

View ▾

<<

Date ▾ Expense Type Amount Requested

Adding New Expense

> 05/20/2018  Hotel
Hilton Hotels, Eugene, Oregon \$154.14 \$4.14

New Expense

Expense Type

To create a new expense, click the appropriate expense type.

✓ Recently Used Expense Types

Hotel

All Expense Types

01. Travel Expenses

Athletics Vendor Air Rcv

Hotel

NCAA Student Athlete Assistance Travel

Other Accommodations

02. Transportation

Airfare

Concur Drop In Work Sessions for July

Location: Thompson University Center, Employee Education Lab, Room 305

No registration required. Bring your questions and projects for assistance. We have laptops in our computer lab for your use.

Thursday, July 5	1:30 - 2:30
Monday, July 9	2:00 - 3:00
Tuesday, July 17	10:00 - 11:00

Thursday, July 19	3:00 - 4:00
Tuesday, July 24	1:30 - 2:30
Friday, July 27	2:00 - 3:00
Tuesday, July 31	10:30 - 11:30

Thank you,



UNIVERSITY OF OREGON

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