

## Mark McCulloch

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**From:** travelnews-bounces@lists.uoregon.edu on behalf of BAO news for travel administrators <travelnews@lists.uoregon.edu>  
**Sent:** Tuesday, May 8, 2018 5:03 PM  
**To:** travelnews@lists.uoregon.edu  
**Subject:** travelnews: Processing Guest Travel in Concur  
**Attachments:** ATT00001.txt

**Guest Travel In Concur Training:** Please register for one of these sessions in My Tracks: <https://uomytrack.pageuppeople.com/learning/2254> **SPACE IS LIMITED.**

- Thursday, May 17 – TUC, 2<sup>nd</sup> Floor Conference Room – 1:00PM – 2:00PMpm
- Tuesday, May 22 – Knight Library – 11:00 AM – 12:00 PM
- Tuesday, June 5 – TUC, 2<sup>nd</sup> Floor Conference Room – 1:00 PM – 2:00 PM

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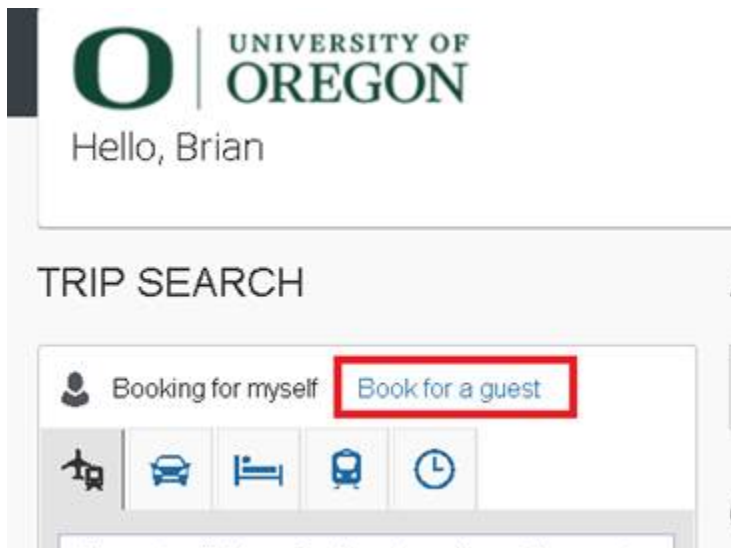
### Instructions for processing Guest Travel in Concur - First determine your guest type:

**Option #1 - One time guest** - Guest will have only one air and/or reimbursement transaction:

**Air** – select one option:

A.) Booking Tool:

- Contact the travel office to have Concur “Book as a Guest” permissions assigned
- Go to the Concur booking tool and select “Book as a Guest”. Complete the reservation, entering your guest information into the passenger screen.



- Concur will present the Request button. Complete a Request and submit for approval.
- Ticket drops into TMC queue for ticketing.

**Note: When using this option, the request generated from the booking must be completed in one business day, or the reservation is cancelled.**

B.) Book direct with TMC (You MUST use this option for Candidates as you cannot legally ask their Date of Birth):

- You or the guest may call the TMC to reserve a flight, but if the guest is a candidate, they must call the TMC directly, as the TMC is not restricted from asking DOB.
- UO Host provides the TMC with these required details:
  - The UO host’s 95 UO employee ID number to associate the credit card charge to reconcile the air expense.
  - The email from Concur forwarded to show the approved Concur Request.
- Enter a Concur Request and select:
  - \*UO-Guest Request Policy
  - #2 – TMC, for “How will I book my trip”.

### Reimbursement (Expense Report):

- Log in to the UO Host’s Concur profile.
- Click on Request , Active Requests, find the Guest’s Request. Click on the “Expense” button in the Action column to create an Expense report associated with that request.
- Check to be sure “\*Guest Policy” carries over to the Expense report from the Request.

### Create a New Expense Report

- Enter all required fields, including the Guest’s Vendor or 95 number and Non Resident Alien status.
- Guest Approval: Use the Print/Email button to email report summary to guest for review and approval. Guest must supply an email saying:

***“I have reviewed my trip to DESTINATION on DATE for \$XXX.XX and I certify that this claim is true and correct and that no part has been claimed previously or will be claimed from any other source.”***

- Delegate uploads guest’s approval email to Expense type “Other Supporting Documentation” with Additional Information note: Guest Approval, and submits on behalf of guest traveler.
- Payment will direct to the guest.

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**Option #2 – Guest with multiple transactions/ongoing relationship** – Guest will receive multiple, ongoing reimbursements:

- Guest requires a Concur profile. Go to forms.uoregon.edu, Business Affairs, Travel, Concur Guest Intake form.
- Travel Office builds Concur profile for guest, including delegate(s) and Approver(s). Delegate must work on behalf of traveler as they do not have a uoregon.edu email address to access the Concur profile.

**Air:**

- Submit Concur Request for traveler, choosing “How will you book your travel” - either #1 Use Concur online booking tool, or #2 TMC direct.
- Once approved, follow directions above for Concur booking tool or TMC booking.

**Reimbursement (Expense Report):**

- Delegate or UO Host logs into Concur to their profile. From the list of active Requests, click on “Expense” in the Action column.
- Delegate completes expense report and uses the Print/Email button to email report summary to guest for review and approval. Guest must supply an email saying:

***“I have reviewed my trip to DESTINATION on DATE for \$XXX.XX and I certify that this claim is true and correct and that no part has been claimed previously or will be claimed from any other source.”***

- Delegate uploads guest’s approval email to Expense type “Other Supporting Documentation” adding note in Additional Information box: Guest Approval.
- Delegate submits on behalf of guest traveler.

**Note: Be sure to use the Concur Guest policy when booking travel for profiled guests. See screenshots for previous scenarios as a guide.**



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