



GG Concur System Travel Guide

(Revised April 17, 2020)



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Official U of U Travel Department Guides:

Travel Accounting has their own list of guides for travelers. Check out their website to view or download them: <https://fbs.admin.utah.edu/travel/utavel-home/ref-materials/>.

Official Concur Training Videos:

Additionally, Concur has their own video guides to help understand the process and how to utilize features within the system. To view these videos within Concur, hover over the “Help” drop down menu in the upper right corner and click on “Training”.

Geology & Geophysics Travel Staff (FASB 383):

Department Travel Facilitators/Arrangers:

- Kayleigh Kirkpatrick: Kayleigh.Kirkpatrick@utah.edu
- Shanna Futral: shanna.futral@utah.edu

Department Proxy Approver:

- Steve Rondina: steve.rondina@utah.edu

General Profile & Account Information:

Section 1: Sign In & Signing Up

- To sign into your profile, go to <https://fbs.admin.utah.edu/travel/> and use your CIS login information. Your homepage should look like the one in Figure 1. **Note: UTravel is only set up for University of Utah employees. To request a trip for non-employees or guests, ask your department travel arrangers.**
 - Access will take at least 48 hours to activate.
 - If you have not yet received access to your profile after training, contact the Travel office by phone at (801) 581-1742 or by email at travel@admin.utah.edu.
- To sign up, talk with your Department Travel Facilitator/Arranger (see information under “Geology & Geophysics Travel Staff” above). They will give you instructions on how to get a profile and apply for training.
 - If you already have a profile, you must complete the training before you travel.
- **REQUIRED: Ask Travel Accounting, by calling (801) 581-1742 or emailing travel@admin.utah.edu, to add your Department Accountant as your department-level approver/supervisor. Please see “Geology & Geophysics Travel Staff” to find your Department Accountant.**

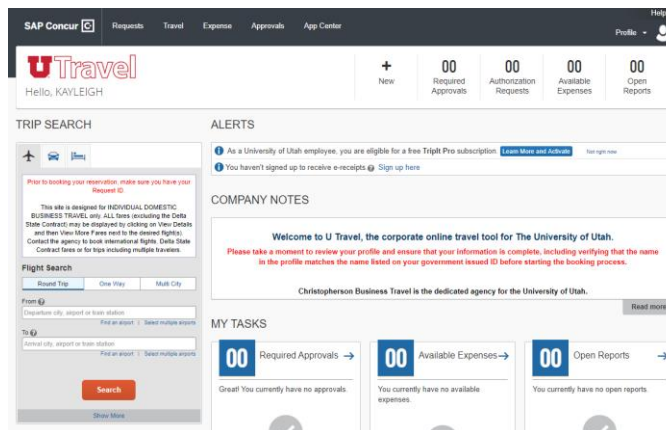


Figure 1: UTravel Concur system homepage. Once logged in, this is what the homepage should look like with an active account.

Section 2: Profile Setup

Before you can book reservations through Concur, you must setup your profile. To setup:

- Click “Profile” in the upper right corner.
- Select “Profile Settings” under your name.
- Go to “Personal Information.”

In “My Profile – Personal Information” there are 9 sections: "Company Information", "Work Address", "Home Address", "Contact Information", "Email Addresses", "Emergency Contact", "Travel Preferences", "Assistants and Travel Arrangers", and "Credit Cards". **Make sure all required fields in these sections are filled.** Some key features in these sections are listed below.

Key features in “Personal Information”:

1. Name: Must match your government issued I.D. or passport. Used for the booking process in the system and is prepopulated from your HR record.
2. Address: Recommended for easier mileage calculations in expense reports.
3. Phone Contact: A home or work number is required. If a home or work phone is not listed, a mobile device will be required to register. To set up a mobile device, see the “**Setting up Concur Mobile Devices**” instructions below.
4. Email Address: Must be verified to upload receipts and itineraries into the system. The first email *must* be your University of Utah email: unid@utah.edu.
5. Credit Card: Required to book and reserve rooms at hotels through the Concur system. Your credit card will not be charge.
6. E-Receipt Activation: Allows for auto collection of electronic receipts into the system from Concur participating suppliers. To activate go to “Profile,” “Other Settings,” and select “E-Receipt Activation”.
7. Assistants and Travel Arrangers: Make your current Department Travel Facilitators/Arrangers (see “Geology & Geophysics Travel Staff” on page 2 for this information) are listed as your arrangers/booking assistants so they can assist you if needed.
8. Expense Delegate: Individuals listed here can do certain tasks on your behalf. To assign or change permanent delegates, contact Travel Accounting.

Setting up Concur Mobile Devices:

- Click “Add a new device”.
- Enter a “Device Name”.
- Select the “Device Type”.
- Select the country of the “Mobile Phone Number” and enter the number related to the device.
- Agree to terms and conditions.
- Click “OK”.

After all the required fields have been filled, click “Save.”

Frequent Flyer Point Programs:

If you want to add a frequent flying point reward program, scroll to “Traveler Preference” in “Personal Information” and find the section called “Frequent Traveler Programs”. Click “Add Program” to add a new reward program and fill out all necessary information.

Section 3: General Profile & Account FAQ

1. Profile Setup:

- Under each section is a “Save” button. This saves *all* the information entered in your profile, not just the information in the section above. If you try to save your profile before all the required fields are filled, it will not save and the system will ask you to finish filling out all the requirements.
- The required birthday and gender fields are under “TSA Secure Flight” in the “Travel Preferences” section.
- Some additional information that may be beneficial to include are credit cards, passport, and frequent flyer information (if applicable).
 - Credit card information will be necessary to hold hotel reservations.

2. Account:

- If you navigate to “Expense Information” under “Expense Settings” in the left-hand profile menu, there are account information filled in the ADSC, BU, Org, Fund, Activity, and Project fields. This information is related to the default chartfield (01-00106-1001-05470-60019) that was registered with your profile. **Do not change it.**
 - This account will *not* be billed for your expenses.
 - This account will auto populate in the same section when you request a trip. This is where you *will* need to change it to your preferred chartfield.

Section 4: Downloading & Using the Concur App



The Concur app can be found in the Google Play Store for Androids and the App Store for Apple devices. The app can be used to:

- Upload receipts.
- Approve requests and expense reports.
 - A notification should be sent to your phone if notifications are turned on
- The app CANNOT be used to request a trip nor create expense reports. **You MUST use the desktop website to do these steps.**

Figure 2:
The Concur App

To register for Concur Mobile:

- Log into your account.
- Select “Profile”.
- Click “Profile Settings”.
- Select “Mobile Registration, and create a PIN.

After downloading, you may log into your account using your registered email address (unid@utah.edu) and your PIN number.

Additional Apps:

There are additional apps that will work alongside Concur to make preparing your trip and collecting receipts easier. Some of these include TripIt Pro (free with your Concur account), Airbnb, Uber, and Lyft. To see all available apps, go to the “App Center” tab. Some apps from the App Center may require account merging with your email in order to work properly.

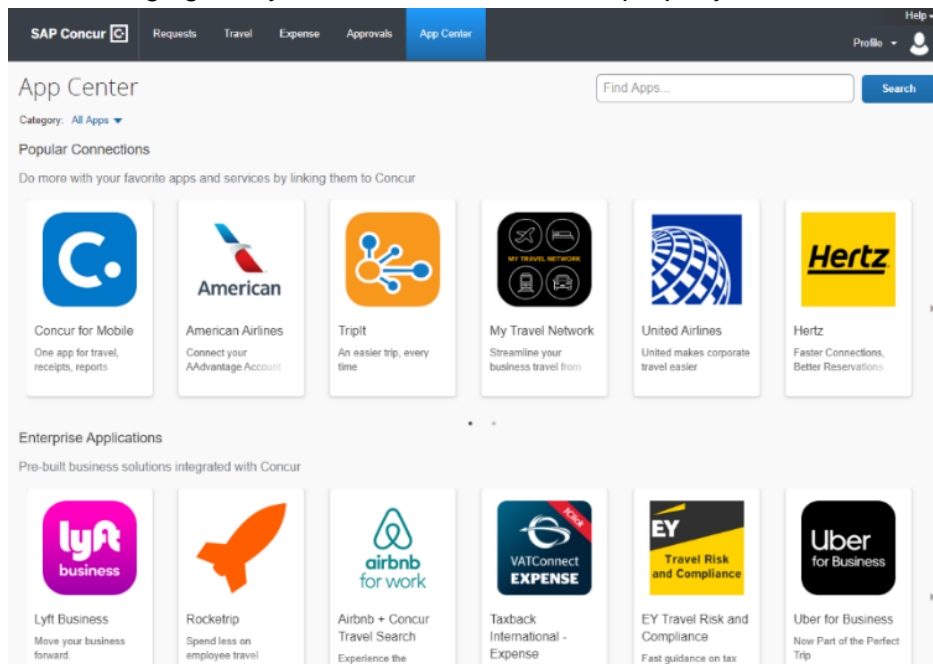


Figure 3: UTravel Concur App Center.

How to Request a Trip:

Note: 1) You CANNOT use the Concur App to Request a Trip; You MUST use the desktop website. 2) Required fields are outlined in red.

1. For Individual Travelers:

- Click the “Requests” tab.
- Select the “New Request” subtab.
- Complete the “Request Header” section (see “Request Section 1a: Request Header” on the next page for more information).
- Add a segment under the “Segments” tab or an expense in the “Expenses” tab.
 - Just do 1 segment or expense. If you have or plan on purchasing a flight ticket, use the “Air Ticket” segment.
 - For segments, see “Section 3: Segments” on page 11 for more information.
 - For expenses, see “Section 5: Expenses” on page 12 for more information.
- Click “Submit Request”.
- Agree to the Final Review Request User Agreement.

2. For Group Travelers:

To register a trip for Group Travelers:

- Fill out the “Request Header”.
 - Make sure to select “Group Travel” under “Traveler Type” and Option 2 under “How will you book your travel?”
- Add a Flight Segment.

You should only book a “Group Trip” if you have 10 or more people traveling on the same itinerary that you, the P.I., books. Once the trip is approved, you may work with a Travel Agent to book your groups flights. Please refer to the group section of “How to Book Flights” on page 13.

3. For Non-Employee Travelers:

Non-employees will need to use the old system, Legacy, to request their travel and reimbursements, which can only be accessed by trained Travel Arrangers. Please coordinate with your Department Travel Facilitators/Arrangers to request such trips.

Section 1a: Request Header - General Details

The screenshot shows the 'Request Header' section of the UTravel Concur system. At the top right, there are buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted'. The form is titled 'Request' and includes a sub-section for 'Additional trip Purpose Information' with tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The main form fields are organized into several sections:

- Request/Trip Name:** A text input field.
- Request/Trip Business Start Date:** A date picker.
- Request/Trip Business End Date:** A date picker.
- Request/Trip Purpose:** A dropdown menu.
- Destination City:** A text input field.
- Destination Country:** A dropdown menu.
- Main Destination Risk Level:** A dropdown menu with 'No Risk (Level 0)' selected.
- Highest Location Risk Level:** A dropdown menu with 'No Risk (Level 0)' selected.
- Traveler Type:** A dropdown menu with 'Employee' selected.
- Trip Type:** A dropdown menu.
- How will you book your travel?:** A dropdown menu.
- Additional trip Purpose Information:** A text area.
- Comments To/From Approvers/Processors:** A text area.
- ADSC:** A dropdown menu with '(05470) GEOLOGICAL & GEOPHY SCI' selected.
- BU:** A dropdown menu with '01' selected.
- Org:** A dropdown menu with '(00108) GEOLOGY & GEOPHYSICS' selected.
- Fund:** A dropdown menu with '1001' selected.
- Activity:** A dropdown menu with '(05470) GEOLOGICAL & GEOPHY SCI' selected.
- Project:** A dropdown menu with '00000000' selected.
- AUU:** A dropdown menu.
- Cash Advance:** A section with 'Cash Advance Amount' (text input), a currency dropdown (set to 'USD'), and 'Cash Advance Comment' (text area).

Figure 4: UTravel Concur system Request Header of a new trip.

1. **Request/Trip Name:** This is the name of your choosing for your trip. It should be short, concise, and distinguishable from other trip titles.
2. **Request/Trip Business Start Date:** The first day of your travel.
3. **Request/Trip Business End Date:** The last day of your travel.
4. **Request/Trip Purpose:** Select the best applied option for the reason of your trip.
5. **Destination City:** If your destination city is not in the list, then use the closest town.
6. **Destination Country:** Will have a Risk Level for each country, ranked 1-5 (low to high).
7. **Traveler Type:** This describes your affiliation with the U.
8. **Trip Type:** This describes the kind of trip you are taking (i.e. International, Domestic, etc.)
9. **How will you book your travel?:** This describes how you plan on traveling.
10. **ADSC:** This is a quick code reference to the account you will be using for your reimbursement.
 - a. The account that is automatically filled in when you request a new trip is the default chartfield, and *must* be changed.
 - b. The first time you want to use any specific account, you will need to fill in all the cells. Then, after you "Save/Submit", that account will show up automatically in the system for future use.

Section 1b: Request Header - Booking Travel

There are two options for booking your travel. Each option under the "How will you book your travel?" field will determine how you proceed in the booking process as well as any additional fees that may incur. See the breakdown list on the next page for more information.

Booking Option Breakdowns:

1. Book in Concur Travel: Use online booking tool/Need Book link
 - a. Select this option if you will be booking through Concur.
2. Book outside Concur Travel: Book with CBT (Christopherson Business Travel) Agent/Other Method
 - a. Select this option for trips you will be:
 - i. Booking through Christopherson
 - ii. Booking on your own without using the Concur booking tool
 - iii. Driving

Both options may be used for individual travelers, but any international or group travel must be booked under option 2. Use this option as well if non-U funds will be covering all of the trip expenses.

Section 1c: How to Fill the Account Distribution Shortcut (ADSC) with New Chartfields

Note: Select the “Code” radial button before typing the number in each field. All newly inserted codes will show as non-bold text in the bottom section below the bold text.

*ADSC (05470) GEOLOGICAL & GEOPHY SCI	*BU 01	*Org (00106) GEOLOGY & GEOPHYSICS	*Fund 1001	*Activity (05470) GEOLOGICAL & GEOPHY SCI
*Project 00000000	*A/U 			

Figure 5: The ADSC section of the Request Header.

- Under ADSC, type and select the activity or project number.
 - Activity number: A 5-digit number that follows the 4-digit fund number
 - Example: 05470 is the activity number of the default chartfield for Department travelers
 - Project number: An 8-digit number that follows the 4-digit fund number.
- Under BU, type and select 01.
- Under Org, type and select the Organization I.D. for the department the account is associated with.
 - Org number for Geology & Geophysics: 00106
 - Org number for Seismology: 00107
 - Org number for CMES/Dean’s Office: 00102
- Under Fund, type and select the 4-digit fund associated with the activity or project number.
- Under Activity, type the 5-digit activity number of the chartfield.
 - For project chartfields: if you are using a project number, type “00000” in the activity field.
- Under Project, type the 8-digit project number of the chartfield.
 - For activity chartfields: if you are using an activity number, type “00000000” in the project field.
- A/U: This is an optional field for most chartfields. You may leave it blank unless prompted to fill it. If you are prompted to fill it, type “0”.

Section 2: Request Header, ADSC, & Billing Accounts FAQ:

1. Request Header:

- Every trip will be given a “Request I.D.” when it has been saved or submitted.
- When to request a trip: Trips 100 miles or more round trip, or that include overnight stays, are considered Travel and should be requested at least 1 day before travel for domestic trips and 3 weeks before international trips.
- Submitted requests can be viewed in your “Trip Library,” found under “Travel” on the top navigation bar, or under “Manage Requests” in the “Requests” tab.
- Field Trips or Group Travel: You may request a trip if they qualify as Travel (100+ miles or includes overnight stays), there are 10+ people traveling on the same itinerary, and only if you’re seeking reimbursement for expenses.
 - Reserving department vehicles is not the same as requesting a trip, but you may reserve them for your travels. Talk with your Department Travel Facilitators/Arrangers for more information.
- Trip Date Changes: If you request a trip and the travel dates change, request a new trip and delete the old one. If you need to edit trip dates after you recently submitted it, you can “Recall” it if both dates have not yet past or the trip has not been approved
- Recalling Trip: You may recall a trip by selecting the trip and clicking the “Recall” button in the top right corner of the interactive window. However, you cannot recall a trip if both the departure dates and the return dates are past or the trip has been approved.
- Destination City: If your destination location is not available, select the closest available city or town.
- Using Non-University Funds: Trips covered by an outside entity don’t need requesting unless you will be seeking reimbursement. To request these, use option 6: “Paid by Outside Entity (No Reimbursement)” under the “How will you book your travel” field. If you do not have any expenses to reimburse, you will need to “Delete” the trip after it is over.
- International Trips with no expenses still need to be requested to secure the U of U Global Engagement Travel Insurance. The instructions for obtaining the insurance will be emailed to the traveler after the trip has been requested and approved.
 - If this is the only expense you will have, it is reimbursable through an ePR. **Don’t submit an expense report; each one costs \$35.**
- Destination Risk Level: Every location has been labeled with a risk level ranging from 1-5. Risk levels from 1 to 3 are relatively low risk and will be processed and approved as normal. Higher risk places labeled as 4 or 5 will be sent to the Global Engagement Committee to review and your trip may be denied by them if they think the trip will be unsafe for you.

Section 2: Request Header, ADSC, & Billing Accounts FAQ (Continue):

2. ADSC and Billing Accounts:

- The default chartfield associated with your account is *not* meant for traveling. Its only purpose is to set up your account so you may begin using the system.
- When you request a trip, you will identify what primary account will be charged.
 - No fees are charged until an expense report is submitted. If multiple accounts are involved, you may allocate those expenses while making the report. See “Expense Report Section 2a: Adding Expenses to Report” on page 17 for instructions.
- Approval Levels: The approval levels are determined by the ADSC of your Activity or Project number. Each number represents a level above the Org Head, so level 1 is one level above, level 2 is two levels above, etc. Level 0 represents the Org Head for the Activity or Project number. The Org Head of all Activities and Projects under the Org Number 00106 is the Chair of the Geophysics Department.
 - The Geology & Geophysics Department has set up a proxy for Chair approval as backup, who is the Department Proxy Approver. Please refer to page 2 under “Geology & Geophysics Travel Staff” for this information.
- Cash Advances: Travel prefers travelers to utilize cash advances to pay for their trip instead of submitting multiple expense reports. This option is good for travelers who want to use their University funds instead of personal cards or who prefer to not wait for reimbursement.
 - Cash Advances can *only* be requested during the “Request” process, not after. Provide a short list of planned purchases with the money and their estimated cost.
 - There are no limits to how much you can request.
 - Only requires Supervisor approval. Vice President’s approval is unnecessary.
 - Any difference between the advance and the reimbursement total must be paid back to the University.

Section 3: Segments

- Go to “Segments”
- Add a segment of your choosing
 - Available Segments: Air Ticket, Car Rental, Hotel Reservation, and Railway Ticket

Note: All segments only need estimated values. You do not need to know the exact amount or exact times you will be leaving and arriving.

- To add a segment, select an icon. There will be some required fields that must be filled for each type of segment.

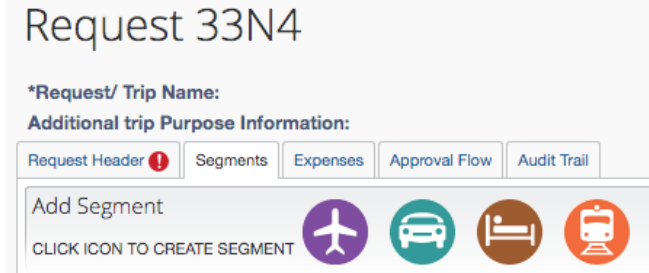


Figure 6. The segments tab main window with its available options.

Segment Fields:

- Dates in all segment types will auto populate to the dates of the trip. They can be changed if necessary by clicking “Recall” in the Request. **Keep in mind recalling your trip will require approvals from approvers again.**
- Air & Railway Tickets:
 - Identify the segment as “Round Trip”, “One Way”, or “Multi-Segmented”.
 - Outbound:
 - From & To: Identify the assumed location you will be leaving and arriving.
 - Air ticket: Locations are airports in the desired city.
 - Railway ticket: Locations are stations in the desired city.
 - Time: Identify the approximate time you will be departing at or arriving by.
 - Times are listed every 30 minutes.
 - Return:
 - Time: Same as outbound; identify an approximate departure or arrival time.
- Car Rental:
 - Pick-up & Drop-off:
 - Identify where you will pick-up and drop-off the rental vehicle.
 - Time of pick-up and drop-off may be included, but are not required.
- Hotel Reservation:
 - Check-in & Check-out:
 - Identify the city you plan on staying in during your trip.

Section 4: Segments FAQ

- You must either add a “Segment” or “Expense” before you can request your trip. “Segments” refers to estimate trip logistics that you may need to make reservations for air tickets, car rental, hotel, and railway tickets. “Expenses” refers to accurate trip logistics that do not need a reservation but will need reimbursement afterwards.
- If you are booking flights, use the “Segments” tab. If not, use “Expenses.”
- If you are taking a driving trip, it may be better to include an “Expense” for the mileage instead of a Segment. Please review “Section 5: Expenses” on the following page for more information.

Section 5: Expenses

Request 33N4

Attachments ▾ Print / Email ▾ Delete Request Submit Request

Status: Not Submitted

*Request/ Trip Name:
Additional trip Purpose Information:

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
------	--------------	--------	-----------

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- 03. Personal Car Mileage
- 09. Other
 - Seminar Registration/Fees

TOTAL AMOUNT: \$0.00 | TOTAL REQUESTED: \$0.00

Figure 7. The Expense tab under New Requests

1. Go to “Expenses”.
2. Click “New Expense”.
3. Select one of the available options.
4. Fill out all required fields.

Note: For driving trips, use the “Personal Car Mileage” option. You will only need to provide one leg of the trip to submit your Request. This amount may be changed when making the Expense Report if you traveled more or less miles than estimated. Your account will not be charged when you submit the Request.

Concur Video Resources:

Manually Creating and Submitting a Request:

http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_manually-create-request.html

Requesting Approval prior to Booking a Trip: http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_request-to-travel.html

How to Book Flights:

1. For Individual Travelers:

- **Domestic Flights:** After requesting your trip, you may start booking your flights.
 - Go to the “Request” tab and select the trip.
 - Click on “Book” under the “Action” column in line with the trip, or click on “Book through Concur Travel” at the top of the Segments section.
 - If you entered an Air Ticket Segment for your Request, the system will automatically search for flights using the details provided.
 - Find the flight you want, click “View Fares,” and select your preferred rate. You can select it by clicking on the cost.
 - You may also view more details and additional rates by clicking “Show all details” under the “View Fares” button.
 - Additional fares will be listed under “Fare Options” with their price to the far right. This will only show the fares for Economic class; any higher tiered seating may be viewed by clicking “View more fares” after “Fare Options”.
 - Review each page and click “Next”, until you reach a page with the button “Confirm booking”.
 - Click “Confirm booking” to secure your reservation
- **International:** To book international flights, call Christopherson at (801) 587-9005.

SALT LAKE CITY, UT TO BOSTON, MA
SUN, NOV 24 - SAT, NOV 30

Show as USD

Hide matrix Print / Email

All 60 results	American Airlines	Multiple	United
1 stop 60 results	775.00 12 results	1,056.00 42 results	1,122.00 6 results

Shop by Fares Shop by Schedule

Please note: search results are based on your selected criteria and other factors including company policies. Fare, schedule or availability information may not be complete or in neutral order.

Refundable State fares will not be displayed on the U Travel site. U Travel will offer all cabin fares, as well "basic economy" (highly restrictive) fares only. Please add a message at the end of the reservation to alert an advisor of the need to compare to State fares. If during your search, you are not finding the flights or fares you expect, please contact the agency.

Flight Number Search Sorted By: Price - Low to High

Displaying: 60 out of 60 results. Previous 1 2 3 4 5 6 Next | All

American Airlines	07:40a SLC → 05:10p BOS	1 stop DFW	7h 30m	\$775.00
	09:30p BOS ← 06:36a SLC	1 stop PHX	11h 06m	View Fares
Show all details				
American Airlines	07:40a SLC → 07:12p BOS	1 stop DFW	9h 32m	\$775.00
	09:30p BOS ← 06:36a SLC	1 stop PHX	11h 06m	View Fares
Show all details				
American Airlines	11:50a SLC → 10:58p BOS	1 stop LAX	9h 08m	\$836.00
	09:30p BOS ← 06:36a SLC	1 stop PHX	11h 06m	View Fares
Show all details				
American Airlines	07:40a SLC → 05:10p BOS	1 stop DFW	7h 30m	\$877.00
	09:40p BOS ← 08:19a SLC	1 stop DFW	12h 39m	View Fares
Show all details				

Figure 8: Flight search results in the booking process.

Concur Video Resources:

Booking a Flight: https://www.concurtraining.com/resources/booking_a_flight.htm

2. For Group Travelers:

- Domestic and International Trips:
 - Contact Christopherson at (801) 587-9005.
 - Follow up with an email to the Travel Agent to provide the following information:
 1. The Request I.D. of the trip,
 2. PDFs of desired flights,
 3. Full Name on I.D., Date of Birth, Gender, Passport or I.D. number, Expiration Date, Frequent Flyer number (if applicable), and an email address for each traveler.

3. For Non-Employee Travelers:

For Non-Employees, they can either book their flights themselves and request a reimbursement or request Department Travel Arrangers to book it on their behalf.

Booking Flights FAQ:

- Flights for any trip can only be booked after the Request has been approved.
- You may use the search tool on the left-hand side of the homepage to find flights before booking. However, you can't use this tool to book your flights without going through extra steps to assign the reservation with a specific trip. It is easier to go to the trip itself through "Request" and click the "Book with Concur Travel" button.
- There are helpful filter tools on the left-hand side in the search results section of the booking tool.
- The details you add into the "Air Ticket" segment when requesting your trip will influence the booking tools search results. If you cannot find the flight you want, even with the filter tools, go back to the request itself, and click "Recall". Go to "Segments", select the "Air Ticket Segment", click "Modify", and change any details to widen your search results.
- You must click the "Confirm Booking" button to secure your reservation. If you leave the booking tool before doing so, it will be held for 24-hours. After that, your reservation will be cancelled, and you will need to rebook your flight.
- To view any reserved and confirmed tickets, go to the "Travel" tab at the top.
- Employee & Guest Booking: If you are bringing an additional guest, visit <https://fbs.admin.utah.edu/travel/agency/> and select "Book a Trip."
 - If the travel has high status frequent flyer membership and wants to give frequent flyer benefits to their guest traveler, they must be booked under the same airline confirmation number in the Concur system.
- Group Travel Booking: Group Travel is defined as 10+ travelers on the exact same itinerary and is done on the group leader's profile.
- Airline Tickets: Tickets booked through Concur are billed to the University Credit Card by default, then it's charged to the account the trip was registered on or the account identified when making allocations in the Expense Report (during the reimbursement process).
 - Personal credit cards can be used, especially when accruing frequent flyer points. To learn how to set this up, please refer to "Section 2: Profile Setup" on page 2.
 - To use a personal credit card, book your flight through Concur and in the Travel Agent notes section state that you would like to use a personal card with a method of contact. The Travel Agent at Christopherson will follow up with you to figure out the payment method.
- Change Trip, Airline Tickets, Car or Hotel:
 - Airline Tickets: Once a request is approved and the travel is confirmed and ticketed, the traveler must contact the travel agency at travel@admin.utah.edu to make any changes.
 - Car & Hotel: Car and hotel changes can be made in the Booking Tool. Christopherson Business Travel Advisors are available to help if necessary.
 - All change fees and fare differences for changes are billed to the registered account for the trip.

How to Create an Expense Report:

- Go to “Requests”,
- Click “Expense” in the same line of the desired trip.
 - The “Expense” link will be located to the far right of the page under the “Action” column.

The first page is the report header for the expense report. The information here is the same as that included in the requesting process. Clicking the “Next” button will prompt a pop-up asking to include Per Diem. If you are not requesting Per Diem, you may skip to Section 2.

Note: If you will have a travel reimbursement funded by a travel grant, please bring these to your Department Travel Facilitators/Arrangers.

Section 1: Per Diem

Per Diem is based upon dates and times from the itinerary. Travelers can select “Import Itinerary” that can bring the Trip Dates, Times, and Destinations from the Flights, Car, and Hotel Reservations. If those are not there, you must create your Itinerary by using the “Add Stop” feature.

1. For easy Per Diem calculation: Click “Import Itinerary”.
 - a. Itineraries can be imported if you added a copy of your flight itinerary to the Concur system OR if you booked flights through the Onsite Travel Agency.
2. Creating Itineraries (in lieu of Importing):
 - a. Click “Add Stop” and under the section labeled “New Itinerary Stop” add Departure City, Date of Departure, Time of Departure, Arrival City, Date of Arrival, and Time of Arrival,
 - i. The first stop should be for the first day of travel.
 - b. Click “Save”,
 - c. Then add the same type of information for your last day of travel.

Note: If you have multiple stops for your first and/or last day of travel, add each layover as a separate “Itinerary Stop” to get the maximum amount for your Per Diem as possible.
3. Viewing Available Itineraries:
 - a. After adding your stops or importing an itinerary, click “Next”.
 - i. You may select an itinerary if you have multiple available, but if you have only one you may click “Next” again to adjust the Per Diem amount you will receive.
4. Adjusting Per Diem Totals:
 - a. After selecting your itinerary, you can adjust the total Per Diem amount you will receive.
 - i. Each line shows the date, location, and the maximum amount per date by default.
 - b. To exclude a date: Click on the first checkbox to the far left in the same line as the desired date.
 - c. To exclude a meal, click the checkbox for the meals that were provided, or you don’t want reimbursed.
 - i. You may select more than one meal for a single date.

Note: Specific reduced Per Diem rates cannot be identified for smaller amounts. If you want a reduced Per Diem, exclude meals or days.
5. When you are done, click “Create Expenses”.

Section 2a: Adding Expenses to Reports

1. Under the “New Expense” Section to the right, select the type of expense,
2. Fill out the required information,
3. Click “Save”.
 - a. This will save the amount to the chartfield selected when requesting the trip, and will be charged to the account after the report is submitted and approved.
 - b. If you’re charging all or part of the amount to a different chartfield/account, click “Allocate”.
 - i. In the new window, add the new chartfield the same way you add a chartfield when requesting a trip.
 1. Input the percentage of the total you want allocated to that account. Use decimal percentages for more exact amounts.

Note: For itemized expenses, you must click the checkbox next to the item and select “Allocate”. The master expense line CANNOT be allocated.

UTravel Video Resources:

How to Allocate Funds: https://www.youtube.com/embed/LGOX4cMW_Eg

Section 2b: Itemizing Lodging Expenses

- If you haven’t added your lodging expense, click “New Expense” and select “Lodging”. Fill out the necessary fields in this Expense. If you have already added one, click on it from your list of added Expenses.
 - Click on “Itemize”,
 - Fill in the required fields. The Room Rate should be the base rate before taxes.
 - Any additional charges, such as secondary taxes, can be listed in the other identified fields.

Concur Video Resources:

Itemizing Nightly Lodging Expenses:
https://www.concurtraining.com/resources/itemizing_nightly_lodging_expenses.htm

Section 3: Uploading Receipts

- Option 1: Concur App
 1. Open and login to “Concur Mobile”,
 2. Tap the “Expenselt” icon and take a photo of your receipt,
 - After the photo is taken, Concur will analyze the receipt for details such as the amount, vendor name, and the date.
 - After the analysis is complete the digital receipt will be available in “Available Receipts” under the “Expense” tab.

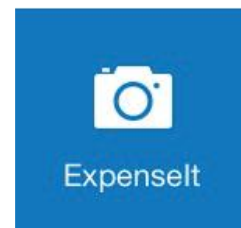


Figure 9: The Expenselt icon as it appears in Concur Mobile.

- Option 2: Direct Upload
 1. Select an expense.
 2. In the bottom right of the information box of the expense, click “Attach receipt”.
 - If you already have a receipt in your profile, you may select it from the bottom section
 3. Click “Browse” and find the folder your receipt is saved on your computer and then select it.
 4. Click “Attach”. The receipt should now relate to that expense, which you can view by clicking on the “Attached receipt” tab above the information box.
- Option 3: Email Upload
 - If you don’t have a button to upload receipts, or you can’t find it, you can email your receipts to the Concur system. Simply email them to receipts@concur.com from your unid@utah.edu email address.

Concur Video Resources:

Creating a New Expense Report:

https://www.concurtraining.com/resources/creating_a_new_exp_report.htm

Working with Available Receipts:

https://www.concurtraining.com/resources/receipt_store.htm

Section 4: Expense Report FAQ

- Pre-Trip Expenses: All pre-trip expenses must be paid for yourself unless you book flights, car rentals, and lodging through the Concur booking tools. For these expenses, cash advances are strongly encouraged to request and use. If you choose to not request a cash advance and instead submit a pre-travel expense report for your reimbursement, be aware that every time you do one the primary account is charged a fee: \$15 for driving trips, \$25 for domestic, and \$35 for international. We recommend holding onto all the trip's receipts and create a single expense report after it is over.
- Receipts: While on your trip, upload your receipts into the Concur app. After your trip, you may attach them to the purchase lines in the expense report of your trip. If you forgot to scan your receipts through your phone while on your trip, you may still scan it and attach it on the computer. After you are done with the expense report you may send an email to your Department Travel Facilitators/Arrangers and ask them to review it before submission. If it doesn't need any more work, they'll submit it for approval.
- Flights booked and purchased with points: Flight purchased with frequent flyer points cannot be reimbursed.
- Car Rentals: If you don't use National, Hertz, or Enterprise, you'll be charged \$3 per day as an insurance surcharge. This fee will only show up in "Management Reports".
- Approvals: When "Expense Reports" are submitted, you may view the approval process by going to "Expenses" and then clicking on the desired trip. In the expense summary page, there is a "Details" link with a drop-down arrow. In that menu, there is a link called "Approval Flow". This will take you to a page that shows who the approvers are and the status of the report in the process.
- If you don't have expenses to reimburse, you must "Delete" the request after you return.
- Exceptions: Exceptions will be highlighted in red or yellow in the line of the expense and at the top of the page. These may be highlighted for various reasons, such as itemization, purchase date outside the travel dates, etc.
- Allocations: Charges that are allocated to another chartfield will have a blue pie chart symbol under the date of the expense. To view the chartfield, hover the cursor over the symbol and a window will appear with the account the allocated portion of the cost will be charged. Some itemized expenses will have a partially filled pie chart when items of the total cost are being allocated. To view those allocations for the appropriate lines, click on the down arrow to expand the expense.
- Alcohol: Reimbursement for alcohol is only permitted for business meals, which is separate from Per Diem, and only on certain accounts. To get reimbursement for it, allocate it to a chartfield with a 1 in the "A/U" field. For more information, visit <https://fbs.admin.utah.edu/ga/resources/au>

- Fees:
 - Fees for not booking using Concur or Christopherson will show up on “Management Reports”.
 - There are UTravel fees depending on the trip type you book and they apply to each Expense Report submitted.

Legacy Travel System



Trip Type

\$8	Driving	\$15
\$12	Domestic Flight	\$25
\$20	International Flight	\$35

Booking

\$30	Exchange (All Fares)	\$30
\$0	Domestic Flight	\$0
\$30	International Flight	\$0
By Size	Group	\$50*/\$100**
\$12*/\$30**	Personal/Leisure	\$12*/\$30**
\$30	State Issued Ticket	\$0
	Other Booking Method	\$10*/\$20**

**Domestic*

***International*