



THE UNIVERSITY OF UTAH

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**DEPARTMENT OF  
GEOLOGY & GEOPHYSICS  
TRAVEL MANUAL**

# Table of Contents

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<b>1. University, Department, and SAP Concur Resources</b>	1
a. Travel & Reimbursement Services Reference Materials	1
b. Department Resources	1
c. Department Travel Staff	1
d. SAP Concur Training Videos	1
e. Contact Information	1
<b>2. Video Resources</b>	2
<b>3. Account &amp; Profile Setup</b>	3
a. Key Sections and Features in “Personal Information”	4
b. Setting Up Concur Mobile Devices	5
c. Key Features in “Request Delegates”	5
d. Key Features in “Expense Delegates”	5
e. Other Settings	5
f. Additional Information	6
<b>3. How to Request a Trip</b>	7
a. Request Header - General Details	8
b. How to Complete the Request Header	9
c. How to Complete the Account Distribution Shortcut (ADSC)	10
d. Segments and Expenses	10
e. How to Add a Segment	11
f. How to Add an Expense	11
g. Group Travels	11
h. Guest Travel Options	11
i. Additional Information	13
<b>4. How to Book a Trip</b>	14
a. Individual Travelers	14
b. Group Travelers	14
c. Guest Travelers & Booking Options	15
d. Additional Information	17
<b>5. How to Request Reimbursements</b>	18
a. How to Create an Expense Report	18
b. How to Add Per Diem to Expense Reports	19
c. How to Add Expenses to Expense Reports	19
d. How to Itemize Lodging Expenses	20
e. How to Upload Receipts	20
f. How to Request Reimbursement for Guest Travel	20
g. Additional Information	21

# **University, Department, and SAP Concur Resources**

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## **Travel & Reimbursement Services Reference Materials**

The Travel & Reimbursement Services has an extensive list of reference materials for travelers from getting started with SAP Concur to creating expense reports. The video materials have been listed under the "Video Resources" section for easy access, but there are other reference materials as well. You can check out their materials by going to <https://fbs.admin.utah.edu/travel/uttravel-home/ref-materials/>.

## **Department Resources**

Before traveling for University business, you must receive training to get an account in association with the University. On the Department's website there is a page called "Department Resources" (<https://earth.utah.edu/Department-resources.php>), which is divided into sections and contains various forms and information from its Administration. Under the section "Concur Systems Travel", there is a subsection called "Training" with the steps to learn how to set up and use Concur as a member of our Department.

## **Department Travel Staff**

The Department Travel Staff are located in the Department of Geology & Geophysics main office (FASB, Rm 383). The Travel Arrangers can help answer questions about Concur, how to use it for your upcoming trips, and guest travel options while the Proxy Approver helps the flow of approval.

### **Travel Arrangers & Proxy Approver**


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## **SAP 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" or go to this website: [https://www.concursolutions.com/expense/client/view\\_training.asp](https://www.concursolutions.com/expense/client/view_training.asp).

There will also be links to videos after certain sections if you need help with specific areas. If you see this icon  you can either go to the website or find the corresponding video under "Video Resources" on the following page.

## **Contact Information**

If you need help with Concur, or with the logistics of your trip, contact your department Travel Arrangers or these departments for assistance.

**University  
Travel & Reimbursement Services**

(801)581-7142  
travel\_questions@utah.edu  
[fbs.admin.utah.edu/travel/](https://fbs.admin.utah.edu/travel/)

**Christopherson Business Travel  
(Onsite Travel Agency)**

(801)587-9005  
1-888-739-7011 (after hours)  
9:00 AM - 5:00 PM MST

## **Video Resources**

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Travel & Reimbursement Services and SAP Concur have a library of video resources that may help you navigate and utilize the system. The videos developed by the University will better help you use Concur as a University traveler, but SAP Concur has multiple short videos that can help you with specific aspects of the site that Travel & Reimbursement Services might not have covered explicitly.

### **Travel & Reimbursement Services Videos:**

1. Update Your Profile in UTravel Concur
2. How to Assign a Delegate
3. Creating a New Request in UTravel
4. Booking Travel in Concur
5. Allocations
6. Produce a PDF Summary of an Expense Report

### **SAP Concur Videos:**

1. Updating Your Expense Profile
2. Activating E-Receipts
3. Exploring the Concur Homepage
4. Adding Expenses to a Request
5. Requesting a Cash Advance
6. Closing a Request
7. Changing a Trip After Purchase
8. Introduction to Travel & Expense
9. Creating a New Expense Report
10. Creating a Report from a Request
11. Adding a Request to an Expense Report
12. Itemizing Expenses
13. Itemizing Nightly Lodging Expenses
14. Entering Personal Car Mileage
15. Converting Foreign Currency Transactions
16. Printing and Submitting an Expense Report
17. Correcting and Resubmitting an Expense Report

# Account & Profile Setup

To get a Concur account, you must take the department training as listed in the “Department Resource” webpage on the website. Once you submit Travel’s “Online Concur Training Form” (<https://fbs.admin.utah.edu/travel/utavel-home/concur-online-training-form/>), they will create an account on your behalf. If you do not have access to your account after 48 hours, contact Travel & Reimbursement Services.

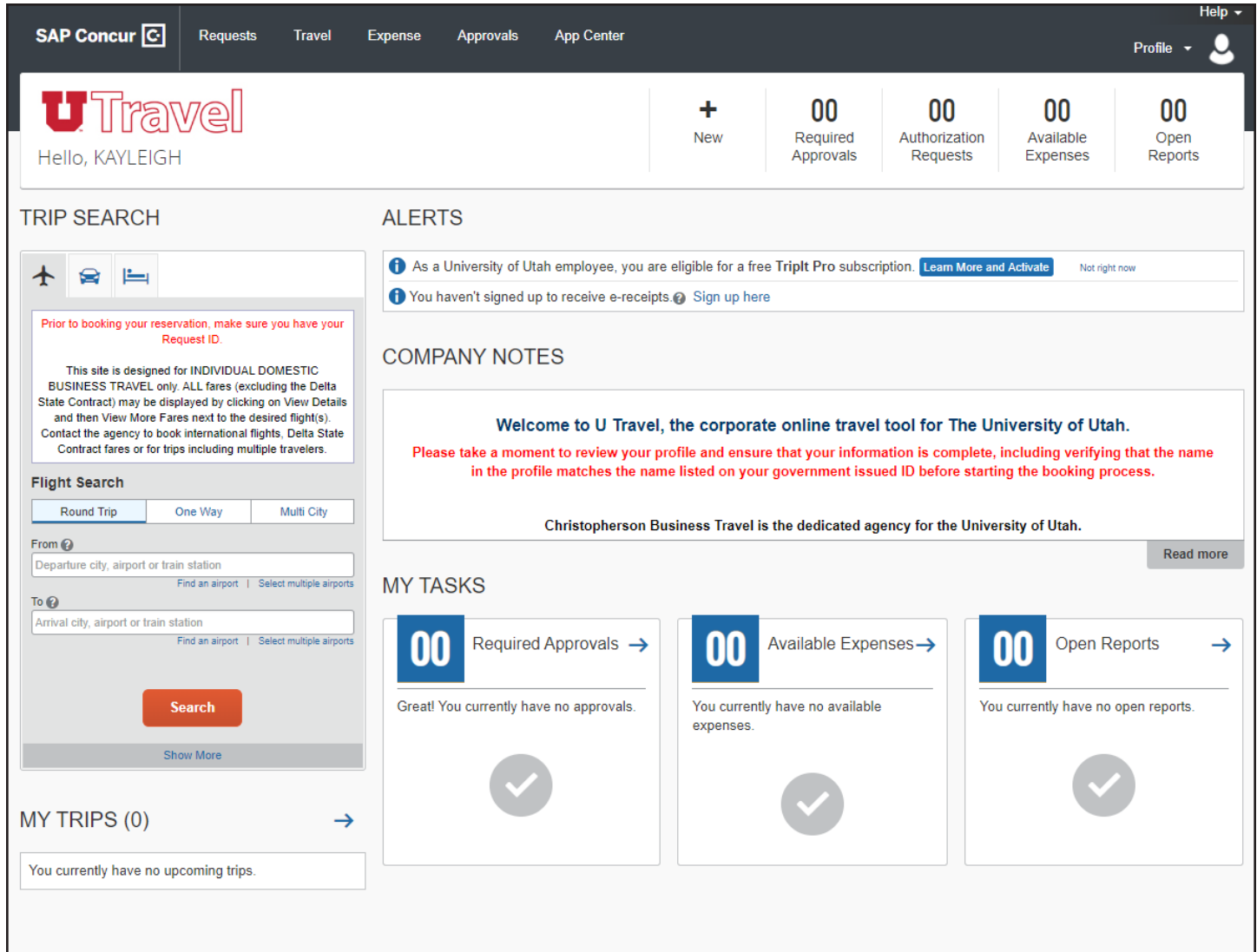


Figure 1. UTravel Concur system homepage. Once logged in, this is what the homepage should look like with an active account.

To sign into your Concur account, go to [fbs.admin.utah.edu/travel/utavel-home/](https://fbs.admin.utah.edu/travel/utavel-home/), click on “Login to Concur”, and use your CIS login information. Once you are in, you must set up your profile before you may book reservations through the system. There are a few different pages where you must update to complete setup: “Personal Information”, “Request Delegates”, and “Expense Delegates”. To access any of these pages:

- click on “Profile” in the upper right corner,
- and go to “Profile Settings” under your name.

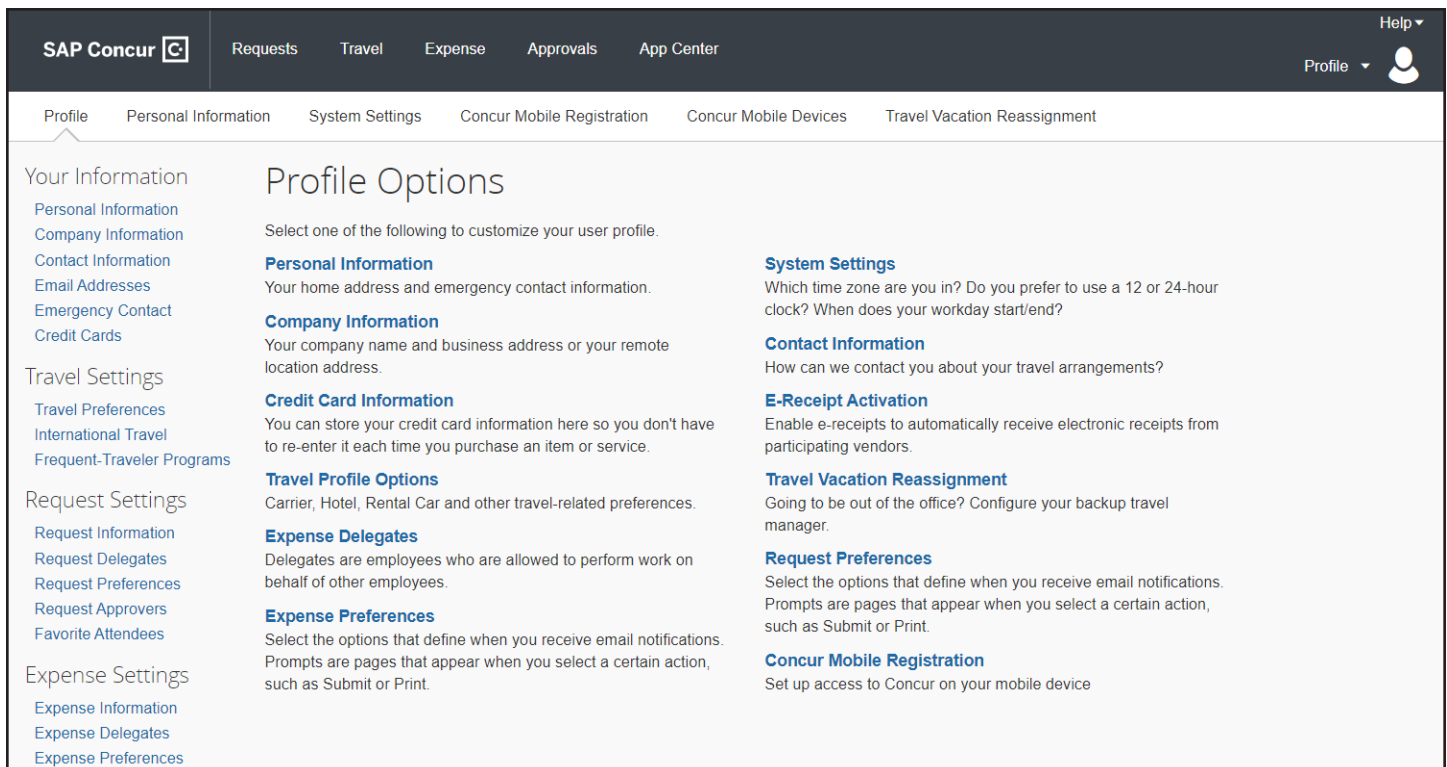


Figure 2. Profile Settings in Concur. The main page has links to the most common pages travelers visit with the side menu containing a complete list of options.

### Key Sections and Features in “Personal Information”:

There are 9 sections within this part of your profile, which can help make certain tasks in the system easier to complete. Some fields must be completed, with key fields including:

- **Legal Name:** Used for the booking process in the system and is prepopulated from your HR record. It must match your government issued I.D. or passport. If any part of this is incorrect, contact Travel & Reimbursement Services for instructions.
- **Company Information:** Includes your Employee ID, Manager, Organization Unit, and Employee Position or Title. If any part of this is incorrect, contact Travel & Reimbursement Services for instructions.
- **Work Address:** Recommended for easier mileage calculations in expense reports.
- **Home Address:** Also recommended for easier mileage calculations in expense reports.
- **Contact Information:** Phone number contacts for safety updates during trips and company contact information. At least a home , work, or mobile number is required. To set up a mobile device, see the “Setting Up Concur Mobile Devices” instructions on the next page.
- **Email Addresses:** Must be verified to upload receipts and itineraries into the system. The first email must be your University of Utah email (unid@utah.edu).
- **Emergency Contact:** Useful in case something happens to you on your trip.
- **Travel Preferences:** Options for your air travel, hotel, and car rental needs. Under this section, a subsection called “TSA Secure Flight” has required fields that must be completed. You may also add a frequent-traveler program, view unused tickets, and add your TSA precheck number if applicable.
- **International Travel - Passports and Visas:** Allows the system to include passport and visa information in your reservations, which can make international travel a little easier.
- **Credit Card:** Required to book and reserve rooms at hotels through the system. Your credit card will not be charge.

## Setting Up Concur Mobile Devices:

1. click "Add a new device",
2. enter a "Device Name",
3. select the "Device Type",
4. select the country of your phone number and enter your number,
5. Agree to terms and conditions,
6. click "OK"

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

## Key Features in "Request Delegates":

"Request Delegates" is where you can add, remove, or change permissions for employees who are allowed to work on your behalf. Your department's Travel Arrangers should be listed under here with the permissions to prepare requests, book travel, submit reports, submit requests, and view receipts in order to help you remotely. If any of your Travel Arrangers are missing, or if you need to make any other changes, you may do so here.

## Key Features in "Expense Delegates":

"Expense Delegates" is another place where you can add, remove, or change permissions for Delegates to work for you, but with expense reports. Many of the options are the same here as the "Request Delegates" webpage. Make sure your department's Travel Arrangers are listed with the same permissions as in the "Request Delegates" page to allow them to help you remotely. If any of your Travel Arrangers are missing, or if you need to make any other changes, you may do so here.

## Other Settings:

- **E-Receipt Activation:** This feature allows the system to automatically collect electronic receipts from participating suppliers. To activate go to "Profile", "Other Settings", and select "E-Receipt Activation".
- **Concur Mobile Registration:** This section may help you set up the SAP Concur Mobile App, which you can use to track status updates for your trip, collect and upload receipts as you make purchases on your trip, and track status updates for previous expense reports and approvals in process. To download and activate, or sign into the app, go to "Profile", "Other Settings", and click on "Concur Mobile Registration" for instructions.

## Video Guides:

- **Update Your Profile in UTravel Concur:** <https://fbs.admin.utah.edu/travel/uttravel-home/ref-materials/updating-your-profile/>
- **How to Assign a Delegate:** <https://fbs.admin.utah.edu/travel/uttravel-home/ref-materials/assign-a-delegate-in-your-profile/>
- **Updating Your Expense Profile:** [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_updating-expense-profile.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_updating-expense-profile.mp4)
- **Activating E-Receipts:** [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_activating-ereceipts.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_activating-ereceipts.mp4)
- **Exploring the Concur Homepage:** [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_exploring-concur-home-page.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_exploring-concur-home-page.mp4)

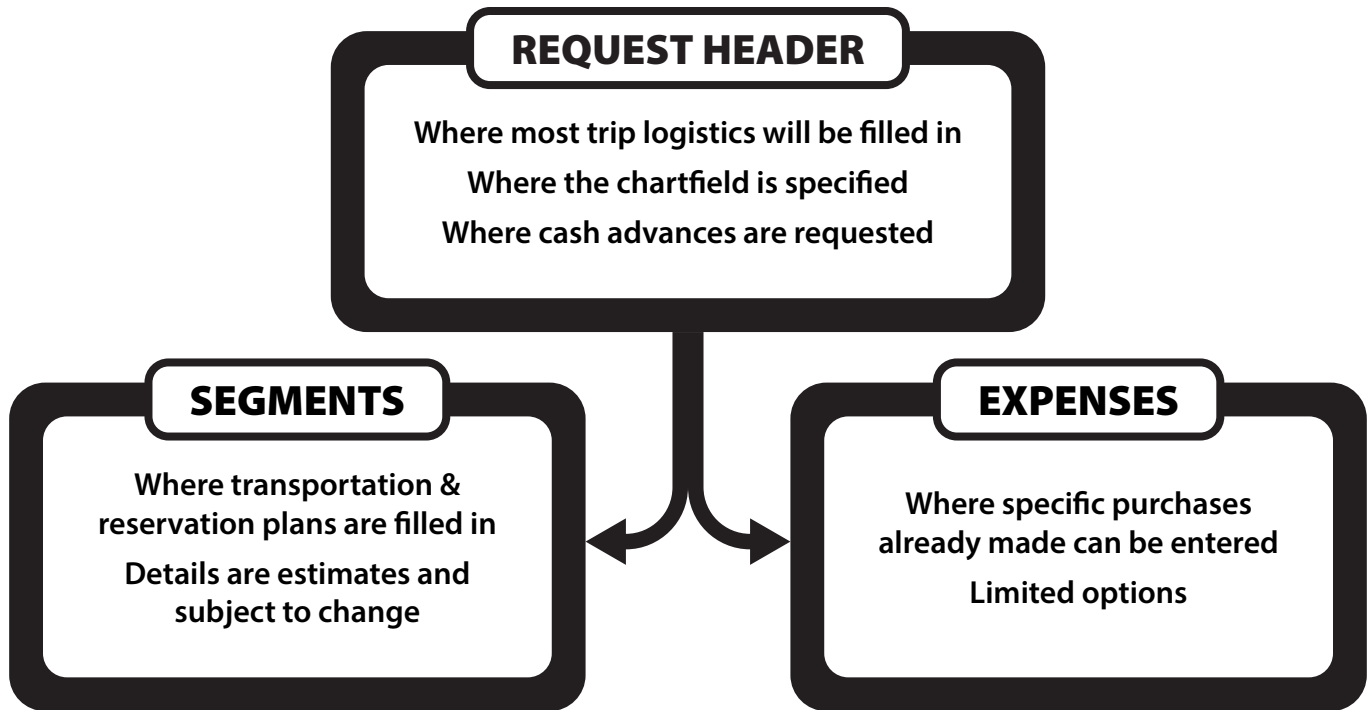
## Additional Information:

- **Saving Personal Information:** Under each section in “Personal Information”, there is a save button. This will save *all* the information on the webpage instead of updating just 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 completing the required fields.
- **Default Chartfield:** 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.**
  - When you request a trip the section with the chartfield information will autopopulate with this field, which will need to be changed to the one you plan to use for reimbursement.
  - This account will not be billed for your expenses.
- **The SAP Concur App:** If you installed and set up the SAP Concur App, be aware that you *cannot* use it to request a trip or create expense reports.



## How to Request a Trip

Here's a simple breakdown of creating a new request for an upcoming trip:



A new trip must be requested if it is 100 miles or more round trip, or it includes overnight stays. Domestic trips must be requested a day in advance, and international trips must be made 3 weeks in advance. When creating a new request for a trip, the process is very similar for individuals, groups, and non-employees or guests. To create a new request go to the "Request" tab at the top of the webpage, and click on "New Request". This will bring you to the request header where you will need to fill in specific details of your trip.

Figure 3. Request Header for a new request. The fields with a red bar on the left side are the required fields.

### Request Header - General Details:

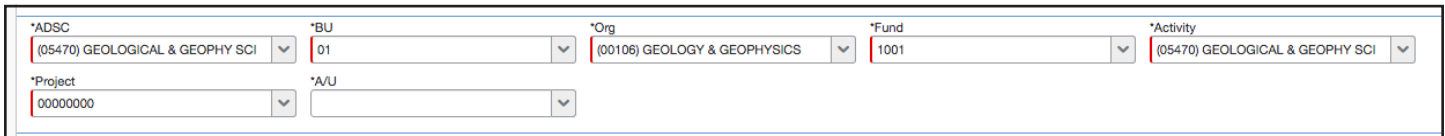
Most of your trip details will need to be entered here. Below is a list of the required fields and their descriptions.

- **Request/Trip Name:** This is where you can enter a nickname for your trip. It should be short, concise, and distinguishable from other names.
- **Request/Trip Business Start Date:** This is the first day of your trip. If you use the Concur booking tool, the system will autopopulate the departure date from this field.
- **Request/Trip Business End Date:** This is the last day of your trip. If you use the Concur booking tool, the system will autopopulate the return date from this field.
- **Destination City:** This is where you are planning to go. If your destination is not on the list of available places, use the closest town and specify your actual destination in the “Additional Trip Purpose Information”.
- **Destination Country:** The country your destination resides. Each country has a Risk Level ranked 1-5 that changes with time, with a Risk Level 1 being the lowest and Level 5 being the highest.
- **Trip Type:** This describes the kind of trip you are taking and separates campus business from hospital business. The dollar amounts in parentheses is the submission fee for expense reports when requesting your reimbursement.
- **Request/Trip Purpose:** This is a categorical-based description of the reason for the trip. Please select the best applied option.
- **Traveler Type:** This informs the system the type of traveler that will be on the trip.
- **How will you reserve air, car, and/or hotel:** This informs the system how you will be booking your transportation and lodging reservations.
- **Do you want University Travel Advisor assistance booking travel:** This informs the system if you will be needing assistance from a Travel Advisor from Christopherson.
- **ADSC:** The Account Distribution Shortcut. This is a quick code reference to the account you will be using for your reimbursement. The default chartfield must be changed to one you have access or permission to use. The first time you use any specific account, you will need to fill in all the cells and save the request or submit when you are finished in order for the system to autopopulate the ADSC with the same chartfield the next time you use it.

## How to Complete the Request Header:

1. Enter a name for your trip in "Request/Trip Name",
2. Enter the start and end dates of your trip in "Request/Trip Business Start Date" and "Request Trip Business End Date",
3. Enter the city name and country in "Destination City" and "Destination Country"
4. Select the "Trip Type" (make sure to select the CAMPUS version of the option); most common options:
  - a. Domestic Group: for group trips in the U.S.
  - b. Domestic Out-of-State Travel: for individual travelers traveling outside Utah, but in the U.S.
  - c. In-State Travel: for individual travelers traveling within Utah
  - d. Int'l Group: for international group trips
  - e. Int'l Travel: for individuals traveling internationally
5. Select the "Request/Trip Purpose"; most common options:
  - a. Guest/Speaker/Artist/Prof./Lecturer
  - b. Professional Collaboration or Meeting
  - c. Professional Development/Other
  - d. Publicized Conference or Meeting
  - e. Research/Field Work/Prof. Project
6. Select the "Traveler Type",
  - a. Employee: for faculty, staff, or graduate students traveling individually
  - b. Group Travel: for group travels of 10 or more people being set up by the group leader. See "Group Travels" for more information
  - c. Guest: for setting up a trip for a University guest. See "Guest Travel Options" for additional information
  - d. Student: for undergraduate student travel
  - e. Team Travel: for athletic team group travel
7. Choose how you will be reserving your flights, car rental, or hotel,
  - a. I need the Book link and will use the Concur Booking Tool: for booking your reservations through Concur's Booking Tool
  - b. I've already booked/will book outside the Concur Booking Tool: for booking reservations via other methods
3. Choose whether or not you will want assistance from a University Travel Advisor for booking your travel,
4. Fill out the "ADSC", "BU", "Org", "Fund", "Activity", and "Project" fields with your chartfield information. For help with filling out the ADSC section with a new chartfield, see "How to Complete the Account Distribution Shortcut (ADSC)".
5. If applicable, fill out the "Cash Advance" section with the amount you need in your preferred currency and a breakdown of how it will be used in the "Cash Advance Comment" field.

## How to Complete the Account Distribution Shortcut (ADSC):



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

Figure 4. The Account Distribution Shortcut (ADSC) fields within the Request Header.

When filling out the fields in the ADSC section, there are two ways you can look up the numbers: by “Text” and “Code”. Each one shows up as a radial button in the upper right corner of the drop down menu when you click in a field. The “Text” option allows you to look for a number associated with your chartfield by its name. This method is best used to find an activity or project chartfield that is already associated with your Concur account. The “Code” option allows you to search a field's number by the number from your chartfield. This method is best used when inputting a chartfield not previously associated with your Concur account. All unassociated chartfield numbers will show up in a selected field's drop-down menu in regular font while associated ones will show in bold face font.

- Under the ADSC field type the activity or project number and select the 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, in which case type “0”.

### Segments and Expenses:

All new trip requests must have either a segment or an expense before it can be submitted. 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 you have already purchased and will need reimbursement after your trip. Segments don't require exact numbers to add, but rough estimates. You may use the segments section as a way to plan your trip with your reservations, but the easiest segment type to add is an air ticket if you are flying.



Figure 4. The Account Distribution Shortcut (ADSC) fields within the Request Header.

### How to Add a Segment:

- Go to the “Segments” tab next to the “Request Header” tab in your request
- Click on one of the following segment types:
  - Air Ticket
  - Car Rental
  - Hotel Reservation
  - Railway ticket
- Fill out the required information, then save your request

### How to Add an Expense:

- Go to the “Expenses” tab next to the “Segments” tab in your request
- Click on one of the two available options:
  - Personal Car Mileage
  - Seminar Registration/Fees
- Fill out the required information, then save your request

### Group Travels:

If you are requesting a group travel of 10 or more people, i.e. selecting “Group Travel” under the “Traveler Type” field in the Request Header, then you must select option 2 under the “How will you reserve air, car and/or hotel” field. If you are borrowing department vehicles, you will need to talk to department staff to make arrangements. If you are flying you will need to call Christopherson, our Onsite Travel Agency, to book.

### Guest Travel Options:

For guest travel in association to University business, there are three methods for reserving their travel. Each method defers slightly in the booking process, but *all* require a Request I.D. and *must* be requested in Concur. Here is a brief overview of each option:

#### OPTION 1

- Using the University Travel Agents to reserve airfare or a hotel stay (at one of the six university-preferred hotels means a university credit card is charged, so the guest is not out of pocket for airfare or hotel/room tax.
- University Travel Agents can make vehicle rental reservations, but the guest will need to present a personal credit card upon vehicle pickup.
- Guests should feel free to reserve their own ground transportation (Uber, Lyft, etc.)

## OPTION 2

- Travel Arrangers with a TCard may reach out to vendors directly to make reservations using their TCard (where accepted).
- A signed Credit Card Authorization/Agreement form may be required by hotels.
- Travel Arrangers can make vehicle rental reservations, but the guest will need to present a personal credit card upon vehicle pickup.
- Guests should feel free to reserve their own ground transportation (Uber, Lyft, etc.)

## OPTION 3

- Guests may make their own travel arrangements.
- Guests are reimbursed for out-of-pocket expenses or per diem through ePayment Requests (ePR).
- Select Non-Employee Travel Payment in the ePR.

If you would like to make a travel request for a guest, please contact your Department Travel Arrangers.

### Video Guides:

- **Creating a New Request in UTravel:** <https://fbs.admin.utah.edu/travel/utavel-home/ref-materials/new-request/>
- **Adding Expenses to a Request:** [http://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_rqst\\_add-expenses-to-request.html](http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_add-expenses-to-request.html)
- **Requesting a Cash Advance:** [http://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_rqst\\_create-cash-advance-with-request.html](http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_create-cash-advance-with-request.html)
- **Closing a Request:** [http://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_rqst\\_manually-close-request.html](http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_manually-close-request.html)

## Additional Information:

- **Default Chartfield:** The default chartfield associated with your account is not meant for making requests. Its only purpose is to set up your account so you may begin using the system.
- **Submission Fees:** There are no fees for submitting requests, but there are fees for submitting expense reports. See “How to Created Expense Reports” for more information.
- **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. The Org Head of all Activities and Projects under the Org Number 00106 is the Chair of the Department of Geology & Geophysics.
- **Cash Advances:** Travel & Reimbursement Services 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.
  - Requesting cash advances for guest travelers is prohibited.
  - 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.
- **Submitted Requests:** 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.
- **Update Request Information:** If you need to update or change any information that was provided in a submitted trip request, you may recall it and resubmit it after updating it. Be aware that when you do recall a request, it will need to go through the approval process from the beginning.
  - If the dates of a previously made trip have passed and you are unable to recall the trip to update, make a new trip request and delete the previous version.
- **Non-University Funds:** If you are using non-university funds you will still need to make a trip request. Make sure you select option 2 under “How will you be reserving air, car rental, and/or hotel” so you can make your own reservations and delete the request after you’ve returned.
- **International Trips:** International Trips with no expenses still need to be requested to secure the U of U Global Engagement Travel Insurance, which is a refundable expense through ePR. The instructions for obtaining the insurance will be emailed to the traveler after the trip has been requested and approved.
- **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.
- **Segments:** If you are booking flights, it’s best to use the Air Ticket segment whether or not you are booking through Concur or somewhere else. If you are driving your personal vehicle, use the Personal Car Mileage expense under the “Expense” section and add your miles. You may use the Mileage Calculator tool to help plan your trip.

# How to Book a Trip

Once you have an approved trip request, you may start booking for your trip. Booking trip methods depend on the Traveler Type selected in the trip request. Individuals may book their trips in Concur, but groups will need to coordinate with Christopherson and guests may work with either the University or book their own arrangements.

## Individual Travelers:

To book domestic flights:

1. Go to the “Request” tab and select the trip,
2. 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,
  - a. If you entered an Air Ticket segment for your request, the system will automatically search for flights using the details provided.
3. Find the flight you want, click “View Fares,” and select your preferred rate. You can select it by clicking on the cost,
  - a. You may also view more details and additional rates by clicking “Show all details” under the “View Fares” button.
  - b. 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”.
4. Review each page and click “Next”, until you reach a page with the button “Confirm booking”,
5. Click “Confirm booking” to secure your reservation.

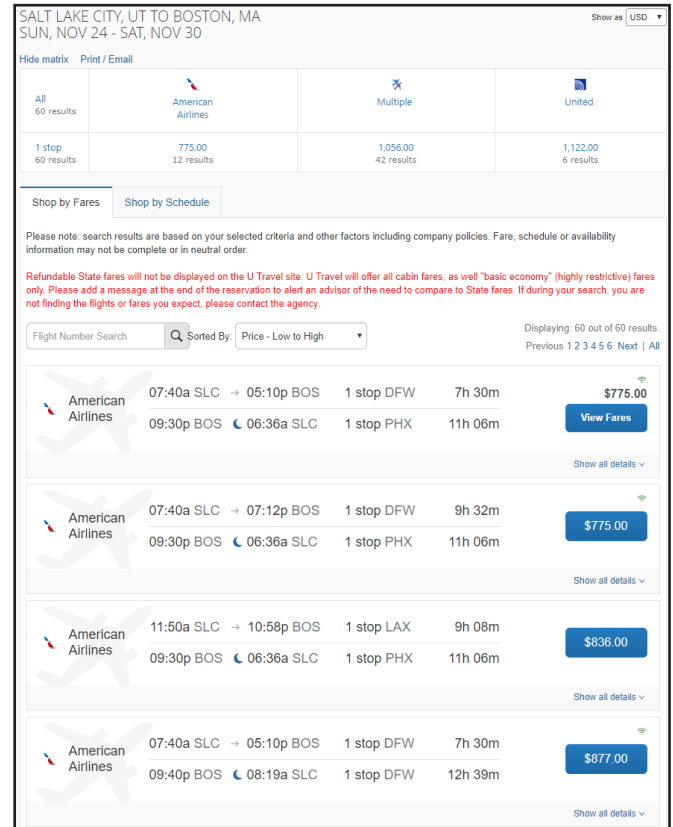


Figure 5. Concur Booking Tool search results.

To book international flights for individual travelers, please contact the Onsite Travel Agency Christopherson to discuss flight options with a travel agent.

## Group Travelers

To book flights for domestic or international group travel, the trip leader must make the booking arrangements with Christopherson. After talking with them, follow up with an email containing the following information:

- Request I.D. of the trip,
- PDFs of desired flight,
- List of each traveler’s 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.



## Guest Travelers & Booking Options

Booking flights for guest travelers depends on the options available from Travel & Reimbursement Services. Under Option 1, the guest works with Christopherson to book reservations. Option 2 requires the guest to work with a confirmed Travel Arranger with a TCard to make the reservations for hotels and car rentals only. Option 3 allows the guest traveler to book their own reservations out of pocket with their own preferences, and their expenses can be reimbursed afterwards through the ePR system. **Make sure a trip request has been submitted and approved before making arrangements.**

### 1. Option 1 Booking Instructions:

- a. Fill out Travel's "Book A Trip" form at this website: <https://fbs.admin.utah.edu/secure/internal/utavel/book-a-trip/>.
  - i. A University Travel Agent will respond with travel reservations within 1 business day using the info provided on the form.
  - ii. A Request ID is required to submit the form.
  - iii. The Book A Trip form must be submitted, or agents will not be aware their assistance is needed.
- b. Once a confirmation email is received from the travel agent, verify all reservations to ensure accuracy.
  - i. If changes are needed, work with travel agents.
- c. Once all the information has been verified, submit the "Confirm A Trip" form to ticket the airfare at this website: <https://fbs.admin.utah.edu/secure/internal/utavel/utavel-confirm-a-trip/>.
  - i. Airfare is not ticketed/finalized until this form is received by the agents.
  - ii. If airfare is not needed, this step can be skipped.
  - iii. You will receive a confirmation email once the airfare reservation has been ticketed.
  - iv. Airfare is not considered finalized until it is in a ticketed status. On-hold/confirmed reservations expire if they aren't ticketed within 24 hrs.
  - v. For instructions on how to fill out the "Confirm A Trip" form, go to the following website: [https://fbs.admin.utah.edu/download/travel/HowTo\\_Submit\\_Confirm\\_Trip\\_form.pdf](https://fbs.admin.utah.edu/download/travel/HowTo_Submit_Confirm_Trip_form.pdf)

### 2. Option 2 Booking Instructions (For Hotels and Car Rentals Only):

- a. For Hotels:
  - i. Provide the following information to the Travel Arranger(s):
  - ii. Name of the Primary Guest
  - iii. Preferred Room Type
  - iv. Dates of Stay
  - v. Contact Information of the Primary Guest

2. Option 2 Booking Instructions (For Hotels and Car Rentals Only):

b. For Car Rentals:

- i. Provide the following information to the Travel Arranger(s):
- ii. Name of Driver
- iii. Preferred Company (Hertz, Enterprise, or National)
- iv. Preferred Vehicle
- v. Pick-up and Drop-off Dates
- vi. Additional Equipment (if applicable)

3. Option 3 Booking Instructions:

- a. Book your reservations independently from the University of Utah's systems
- b. After purchase, hold onto your receipts if you will be seeking reimbursement. For more information, see "How to Request Reimbursement for Guest Travelers".

 Video Guides:

- **Booking Travel in Concur:** <https://fbs.admin.utah.edu/travel/uttravel-home/ref-materials/booking-travel/>
- **Changing a Trip After Purchase:** [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_trv\\_changing-purchased-ticketed-trip.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_trv_changing-purchased-ticketed-trip.mp4)

## Additional Information:

- **Trip Search Tool:** You may use the Trip Search tool on the left-hand side of the homepage to find flights before booking, but 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.
- **Booking Tool:**
  - 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.
- **Reserved and Confirmed Tickets:** To view any reserved and confirmed tickets, go to the "Travel" tab at the top.
  - 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.
- **Additional Guests:** 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:** Group Travel is defined as 10+ travelers on the exact same itinerary and is done on the group leader's profile.
- **Change Trip, Airline Tickets, Car or Hotel:**
  - For air 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](mailto:travel@admin.utah.edu) to make any changes.
  - 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 Request Reimbursements**

Once you are done with your trip and have all of your receipts, you may begin to request a reimbursement. Individual travelers and group leaders of group travels may request reimbursements by creating an expense report in Concur, which has a fee dependent on the Travel Type indicated in the initial request. If you are a guest traveler who is seeking reimbursement, please contact the Department Travel Arrangers.

### **Expense Report Fees:**

Each trip type has a different fee amount, which is charged each time to the chartfield used in the request header when you submit an expense report. The amount is listed next to the trip type in parentheses when you created a new request, but for your convenience a complete list of the campus travel types with their fee is in the list below.

### **CAMPUS TRAVEL EXPENSE REPORT FEES**

Domestic Group .....	\$50
Domestic Out-of-State Travel .....	\$25
In-State Travel .....	\$15
International (Int'l) Group .....	\$100
International (Int'l) Travel .....	\$35
Non-University .....	\$25
Research/Study Participant Travel .....	\$25
TCard Department Reconciliation.....	\$0

### **How to Create an Expense Report:**

1. Go to "Requests"
2. Click "Expenses" in the line of the desired trip
  - a. The "Expense" link will be located to the far right of the page under the "Action" column
3. Double check the information in the report header for the new expense report. It should resemble the request header, with the same information.
4. Click "Next" and choose whether or not Per Diem is to be included
  - a. If you are not including Per Diem, skip to "How to Add Expenses to Expense Reports". Otherwise, continue to "How to Add Per Diem to Expense Reports"

## How to Add Per Diem to Expense Reports:

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.
  - d. 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.
  - d. 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".

## How to Add Expenses to Expense Reports:

6. Under the "New Expense" Section to the right, select the type of expense,
7. Fill out the required information,
8. 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. If it's an itemized expense, you must click the checkbox next to the item and select "Allocate". The master expense line CANNOT be allocated.
    - ii. In the new window, add the new chartfield the same way you add a chartfield when requesting a trip
    - iii. Input the percentage of the total you want allocated to that account. Use decimal percentages for more exact amounts.

## How to Itemize Lodging Expenses:

1. 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.
2. Click on "Itemize",
3. Fill in the required fields. The Room Rate should be the base rate before taxes.
  - a. Any additional charges, such as secondary taxes, can be listed in the other identified fields.

## How to Upload Receipts:


1. Through the Concur App
  - a. Open and login to "Concur Mobile",
  - b. Tap the "Expenselt" icon and take a photo of your receipt,
    - i. After the photo is taken, Concur will analyze the receipt for details such as the amount, vendor name, and the date.
    - ii. After the analysis is complete the digital receipt will be available in "Available Receipts" under the "Expense" tab.
2. Direct Upload
  - a. Select an expense.
  - b. In the bottom right of the information box of the expense, click "Attach receipt".
    - i. If you already have a receipt in your profile, you may select it from the bottom section
  - c. Click "Browse" and find the folder your receipt is saved on your computer and then select it.
  - d. 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.
3. Email Upload
  - a. 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](mailto:receipts@concur.com) from your [unid@utah.edu](mailto:unid@utah.edu) email address.

## How to Request Reimbursement for Guest Travel:

If guest travelers need to request a reimbursement for their out of pocket expenses, please send an email to the Department Travel Arrangers with your receipts with your request. If they traveled via personal vehicle, Travel & Reimbursement Services has a Mileage Log that they may fill out and send with their receipts. They may also send a Google Maps copy of their route with the miles shown.

### Video Guides:

- Introduction to Travel & Expense: [https://assets.concur.com/concurtraining/cte/en-us/temp/cte\\_en-us\\_trv-exp\\_overview\\_OriginalUI.mp4](https://assets.concur.com/concurtraining/cte/en-us/temp/cte_en-us_trv-exp_overview_OriginalUI.mp4)
- Creating a New Expense Report: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_new-expense-report.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_new-expense-report.mp4)
- Creating a Report from a Request: [http://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_rqst\\_create-report-from-request.html](http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_create-report-from-request.html)
- Adding a Request to an Expense Report: [http://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_rqst\\_add-request-to-expense-report.html](http://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_rqst_add-request-to-expense-report.html)

-  Itemizing Expenses: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_itemizing\\_expenses.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_itemizing_expenses.mp4)
- Itemizing Nightly Lodging Expenses: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_itemizing-nightly-lodging-expenses.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_itemizing-nightly-lodging-expenses.mp4)
- Allocations: <https://fbs.admin.utah.edu/travel/utavel-home/ref-materials/allocations/>
- Entering Personal Car Mileage: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_personal-car-mileage.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_personal-car-mileage.mp4)
- Converting Foreign Currency Transactions: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_converting-foreign-currency.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_converting-foreign-currency.mp4)
- Printing and Submitting an Expense Report: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_printing\\_and\\_submitting\\_exp\\_report.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_printing_and_submitting_exp_report.mp4)
- Correcting and Resubmitting an Expense Report: [https://assets.concur.com/concurtraining/cte/en-us/cte\\_en-us\\_exp\\_correct-resubmitting-expense-report.mp4](https://assets.concur.com/concurtraining/cte/en-us/cte_en-us_exp_correct-resubmitting-expense-report.mp4)

## Additional Information:

- **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 account used in the request header is charged a fee. We recommend holding onto all the trip's receipts and create a single expense report after it is over. To see the current expense report fees, see "Campus Travel Expense Report Fees" on page 18.
- **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.
- **No Reimbursement:** 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>.