TRAVEL GUIDE
(Using Concur and Key Travel)
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1. **Pre-approval is required** via Concur when travel expenses include any travel segments (airfare, lodging, and/or car rental).
   - The separate IMS Travel Authorization Form is no longer required
   - All travelers must submit a **Request** for travel approval through Concur
   - Pre-approval request will route via Concur to traveler’s official supervisor
   - Students (non-employees) are not yet integrated in Concur. Student travelers will need to submit IMS Travel Authorization Form which will require Advisor’s approval by signing and providing a KFS# that can be used for reimbursement. **PLEASE NOTE: Students will be integrated in Concur later this year, but for now will still continue to use Sanditz.**

2. Booking airfare or car rental outside of Key Travel (University’s contracted agency) requires a price comparison from Key Travel in order to be reimbursed.
   - Price comparisons are **MANDATORY** and **MUST** be captured the same day that the airfare is booked (comparison must also be a reasonably priced flight, consistent with the time necessary for the business travel).

3. Traveler profile stored in Concur system – complete and accurate information is especially important, as it will feed to reservations and mileage calculations.
   - There is a required verification of personal information when using Concur for the very first time.

4. **Directly paying for airfare, hotel, and/or car rental using a KFS account will no longer be available.** University Travel Card or personal credit card are the only pre-travel payment options. Travelers are required to itemize any expense that includes both business and personal expenses:
   - Travel Card should be used for business expenses
   - Personal expenses should go on a personal credit card
   - Travel Card is to be used for airfare, lodging, and/or car rental
   - Travel Card can also be used to pay for registration and booking of conference hotel

5. Delegates may be added if traveler will seek assistance with compiling documentation prior to submitting their expense report.
   - Maria Mejias will assist IMS travelers when added as a Previewer Delegate by travelers.

6. For all Travel Card transactions, receipts are required for purchases greater than $50. For all out-of-pocket transactions, receipts are required for purchases greater than $25.
AT-A-GLANCE (Cont’d)

7. International travel using the Travel card for incurred expenses (e.g. travel to Japan billed in YEN) will automatically convert to USD within Concur.

8. **Agendas or conference brochures indicating whether meals were provided are required for conferences.**

9. Enterprise and National are UConn’s contracted vendors for car rental. Enterprise and National must be reserved through Concur or directly with the University’s official travel agency (Key Travel) in order to receive the University’s contracted rates.

10. The hotel maximum is 150% of the [Per Diem Rates](#) for the destination city. Hotels can be reserved and paid for by Travel Card. Cash advances are no longer issued for expenses that can be charged to a Travel Card.

   - **Traveler MUST itemize expenses as they appear on the hotel folio.**

11. The University will allow travelers to claim either Per Diem or actual meal costs.

   - **Traveler MUST** use one method of meal reimbursement for the entire trip. The **total reimbursement for actual meal costs over the course of travel may not exceed the amount that would have been reimbursable based on daily per diem rates over the same time period.**

12. Post-travel reconciliation timelines are quite strict.

   - Reimbursements submitted over 60 days after travel is complete must receive approval from Dean, Director, or Department Head.
   - **Reimbursements submitted over 120 days after travel is complete will NOT be reimbursed even with the approval from Dean, Director, or Department Head.**
INTRODUCTION

This Travel Guide is intended to inform IMS travelers of current travel procedures policies for University-funded travel, and to guide in the proper preparation of travel documents using Concur (the University’s travel system). Included with this Travel Guide are step-by-step directions on how to complete certain tasks within Concur. As of April 22, 2020, all employees (including Graduate Assistants) are required to utilize Concur and Key Travel (UConn’s official travel agency) to book, request, and expense travel when traveling on official University business.

Non-employees (students and guests) are not yet integrated to the Concur system. Non-employees can use Sanditz to book airfare, lodging, and/or car rental. To contact Sanditz directly, call 1-800-858-4456 or email UConn-resdesk@sanditz.com.

Additionally, step-by-step guides provided directly from the UConn Travel Services are included as appendices to this travel guide, but the full and most up-to-date resources are always available at: UConn Travel Services - Training and Resources.

UConn’s Official Travel Agency: Key Travel

Should you need assistance from a Key Travel agent contact during normal business hours:

- Monday - Friday 9AM to 6PM ET
- Phone: (267) 603-5501
- Email: uconn@keytravel.com

Services including, but not limited to: New booking requests, post-booking changes or cancellations, and general travel itinerary queries.

For online support, email travel@uconn.edu, or call (860) 486-2289

Emergency Assistance (outside of business hours): for urgent travel related issues which cannot wait until the next business day, you can contact the Key Travel emergency after-hours service. There is a charge to use this service, which is why it should be used exclusively for urgent matters.

- Within the United States: (888) 339-1502
- Outside the United States: 001 (646) 289-6808

Traveling with 10 or more UConn travelers on the same itinerary?

Contact Key Travel groups team for a group ticket quote or room block needs:

- Phone: (646) 880-1537
- Email: usgroups@keytravel.com
APPROVAL TO TRAVEL

ATTENTION: Travelers must submit a Request for travel approval through Concur.

- Access SAP Concur from the SAP Concur Website

Concur allows you to capture your entire trip in one-single application, including the following modules:

- **Request**: module used to seek pre-approval for travel
- **Travel**: online booking tool
- **Expense**: module used to record business expenses – includes out-of-pocket expenses as well as University Travel Card charges

Individuals who incur travel expenses relating to any travel segment (airfare, lodging, and/or car rental) without prior approval from their supervisor bear the risk that their expenses may not be reimbursed upon return.

All UConn business travel (domestic and international) will require submission of a travel request in Concur, prior to booking travel. **NOTE: In Concur the fields identified with a red bar are required.**

**Required fields with a brief description are listed below.** For additional step-by-step directions please see Appendixes A – E of this travel guide. **Please be sure to complete required fields; this is extremely important and will help facilitate supervisor and fiscal officer approvals.**

1. **Request Policy.** This field will default as appropriate.
2. **Trip Name.** Enter a brief and accurate description of the nature of the trip.
3. **Does trip include a Level 3 or 4 Country/Region?** Level 3 or 4 Country/Region field is required. Refer to the Company Notes section in Concur for additional assistance with the Level 3 or 4 Country/Region dropdown.
4. **Business Travel Start Date and End Date.** Enter the first and the last day of your travel.
5. **Trip Purpose.** Make a selection from the dropdown, as appropriate. **NOTE: A conference travel request will require attachment of conference Agenda, including which meals are included.**
6. **Destination City.** Start to type the primary location where business is occurring. A live search result will display. Select a valid option from the dropdown.
7. **Enter additional destinations in the Business Purpose/Justification field.** **NOTE: The segments tab also captures additional destinations, as necessary.**
8. **Traveler Type.** This non-modifiable field defaults from your profile.
9. **Will this trip include personal travel?** If you are including additional time outside of business travel, select yes.
10. **Personal Travel Dates.** Complete field, if personal travel = Yes.
    - If yes, at the time of booking, the traveler should:
      - Call Key Travel directly at (267) 603-5501
      - Obtain a business cost comparison from Key Travel
      - Book Travel reservation with Key Travel
      - **NOTE: Cost comparison must be attached to expense report with submission.**
11. **How will you book this travel?** Options in this dropdown are listed in recommended order.
12. **Click the appropriate option from the dropdown.** Below is a list of the booking options:
   - On-line booking in Concur
   - Agent assist using UConn Travel Management Company
   - Other (Outside UConn Travel Management Company and Concur
   - Non-Travel

13. **Business Purpose/Justification.** Enter a brief description stating the business purpose of travel. This is especially important when all or a portion of the expenses will be allocated to a grant.

14. **Account Number.** This field should pre-populate to the default/home account – based on profile settings. Be sure to update to include any account(s) specific to the travel occurrence.

15. **Cash Advances.** Complete this field on a need only basis.

16. **Trip Segments.** If the trip includes segments then the Segments tab is required. Segments include air, hotel, and car rental.

17. **Estimated Amounts.** Simultaneously launch a separate web browser, login to Concur, and use the Concur Travel module to view available flight details with respective flight and for estimated amounts for hotel and car rental.

18. **Complete travel request.** Provide full name of departing (From) airport and full name of arriving (To) airport. Be sure to include Outbound date and departure time along with Return date and departure time.

19. **Bradley Parking Pass Required.** Make a selection from the dropdown (Yes/No), as appropriate.

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**Adding Travel Delegates**

Delegates **MUST** be added if traveler will seek assistance with compiling documentation prior to their submitting expense report.

- Maria Mejias will assist IMS travelers when added as a Previewer Delegate by travelers.

**PLEASE NOTE:** Preparer Delegates are NOT able to submit Expense Reports for approval. **Expense reports MUST be submitted by the traveler who incurred the expense(s).**

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**Travel Card**

All University employees (faculty, staff, graduate assistants, post-docs) are eligible to apply for a University Travel Card. To obtain a University Travel Card, traveler must complete online [Travel Card Training](#) and achieve a score of 85% (or greater), traveler will then need to print out the certificate of completion and complete the [Travel Card Request Form](#) (attaching the Travel Card certificate), which will automatically route for approval. Travel Card approvals are routed to your direct supervisor, as well as your Dean, Director, or Department Head for approval. Travel booked in Concur is backed by the travel management company, Key Travel. Key Travel will have your Travel card on file once you take the online test and submit your application. This will make it easier to book airfare, hotel and/or car rental.

The Travel card can be used if you were awarded AAUP funds as the card can be used for all business-related travel expenses (e.g. airfare, lodging). When creating expense report, the expense(s) being charged to the award account will be allocated to the KFS account provided on the AAUP award letter. If
spending more than what was awarded, you will have to allocate those expenses to another KFS account.

Travelers must call Key Travel directly when combining business travel with personal travel, as charges must be broken out accordingly. **All personal travel should be put on a personal card and NOT on the Travel card.**

When traveling for monthly meetings (e.g. from Storrs to Hartford) traveler will **NOT** need to use the Travel card. The travel card is for business related purchases. Mileage reimbursement will be paid out directly once an expense report is approved. UConn encourages expenses to be submitted within 14 days of travel.

**Travel Card Use Approved Charges**

- Airfare
- Hotel
- Train (Amtrak)
- Car rental – Fuel for Rental
- Baggage
- Individual Meals (if not claimed on per diem)
- Ground Transportation
- Taxis – Uber/Lyft
- Local train services (e.g. Metro North, MBTA, etc.)
- Tolls
- Parking (excluding all Bradley Airport Parking. Bradley Parking pass should be used.)

**Travel Card Use Restricted Charges**

- Alcoholic beverages
- Personal non-business-related charges
- Personal car gas

**PLEASE NOTE:** Any charges **NOT** in full compliance with University travel policy, are considered restricted.

**TRAVEL PROCEDURE:**

1) **TRAVEL REQUEST**

Travelers will need to set-up a Concur “Profile” with specific personal and account information. Pre-approval is required prior to booking travel, and for every expense report that contains segments (i.e., airfare, lodging, and/or car rental). The Request module will also be used to seek pre-approval for:

- **Bradley Parking** –sends an automated notification to Travel office upon approved Travel Request.
• **Cash Advance** – rules and limitations will be configured into Concur to ensure amounts requested are in line with UConn’s travel policy. These will be approved only rarely, and only to cover expenses not eligible to be paid using a University Travel Card.

The **Request** module is used by UConn travelers to seek Travel* pre-approval.

<table>
<thead>
<tr>
<th>Trip Type (Travel Type)</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-State</td>
<td>Required</td>
</tr>
<tr>
<td>Out-of-State</td>
<td>Required</td>
</tr>
<tr>
<td>International</td>
<td>Required</td>
</tr>
</tbody>
</table>

*Travel is defined as any trip with airfare, hotel, and car rental. Regardless of trip details, approval should be obtained from traveler’s supervisor prior to booking travel.

**LOGGING ON TO CONCUR**

- Navigate to any web browser.
- Access SAP Concur by clicking on the following link: [SAP Concur](#)

Concur will require you to verify your personal information when using Concur for the very first time.

Below is the main dashboard you will see when logging into Concur. A brief description of each section is listed below.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. SAP Concur Ribbon</td>
<td>Displays various categories so you can navigate to a desired section, features exclusive to the selected topic. For example, click Requests from the ribbon to view displaying Request specific information.</td>
</tr>
<tr>
<td>2. Quick Task Bar</td>
<td>Provides Quick Tasks (links) so you can quickly access features such as: start a new report, open reports and request, and manage available expenses.</td>
</tr>
<tr>
<td>3. Trip Search</td>
<td>Provides the tools you need to book a trip, such as: flights, hotel, and car rental.</td>
</tr>
<tr>
<td>4. Company Notes</td>
<td>Includes important, up-to-date, UConn travel and expense related information</td>
</tr>
<tr>
<td>5. My Tasks</td>
<td>Shows your available expenses, open reports, and any approvals requiring your attention</td>
</tr>
<tr>
<td>6. My Trips</td>
<td>Displays your upcoming trips.</td>
</tr>
<tr>
<td>7. Help</td>
<td>This dropdown has links to Concur related reference material.</td>
</tr>
<tr>
<td>8. Profile</td>
<td>Stores personal information used for booking travel, streamlining the request process, and for building expense reports.</td>
</tr>
</tbody>
</table>

2) BOOKING TRAVEL

When traveling on official University business, travelers should familiarize themselves with and adhere to University travel policies. Travelers must obtain documented authorization to travel prior to trip taking place and should endeavor to do so before travel expenses are incurred. This authorization is obtained by submitting a Request for travel through Concur.

Clearly state the business purpose and dates of trip:

- Conference agenda or outline is required.
- For “business meetings,” include who the meeting is with and for what purpose.
- Clearly indicate any personal time added onto or included with the trip date range.

**Directly paying for airfare, hotel, and/or car rental using a KFS account will no longer be available.** However, the Travel Card can be used to pay for registration and booking of conference hotel at the same time.

**Lodging**

A hotel bill typically contains a variety of expenses which may include nightly room charges, nightly room taxes, parking, meals, etc. **Traveler MUST itemize these expenses as they appear on the hotel folio.**

Lodging is at 150% of the **Per Diem Rates**, the only exception where this could exceed that would be if it is a conference rate hotel.

**Car Rental**

Enterprise and National are UConn’s contracted vendors for car rental and should be used to obtain the rates the University offers. **If Enterprise and/or National are not used traveler will need to provide a price comparison from Key Travel.** This should be done on the same date the car rental is reserved.
Travelers who do not use the University’s contracted and preferred agency are still eligible for reimbursement of car rental expenses; provided that the expenses do not exceed the preferred vendor’s comparable cost. **All car rental reimbursement request must be submitted with an itemized paid receipt.** Credit card receipts, by themselves are not sufficient for reimbursement.

**Airfare Price Comparison Requirements**

When a business trip is combined with personal travel a price comparison(s) is **required.** The traveler may only be reimbursed for expenses equal to or less than the cost incurred for the business portion of the airfare (excluding personal travel). **The price comparison(s) must be captured the same date that the airfare is booked.** Price comparisons should provide a reasonably priced flight, consistent with the time necessary for the business travel. Acceptable price comparison documentation options include:

- Contact Key Travel (UConn’s Official Travel Agency)
- Email: uconn@keytravel.com or Call: (267) 603-5501
- Print a list of airfare options from the Concur online booking tool

**International Travel**

Transactions incurred during international travel should always be billed in the local currency to ensure the currency conversion within Concur is accurately calculated (including conversion rates, taxes, etc.).

International travel using the Travel card for incurred expenses (e.g. travel to Japan billed in YEN) will automatically convert to USD within Concur.

**3) EXPENSE REPORTING**

Expense reporting in Concur is used for submitting travel expenses and reimbursement requests. After returning from a business trip, an expense report that includes Airfare, Lodging, and/or Rental Car **MUST** be created from the respective approved Concur “Request” module. When applicable, UCPEA-AAUP award letter must also be attached to expense report prior to submission.

Submit expense report within 60 days from the return of the trip.

Expense reports can be created:
1) From an approved request in the Request Module (when air, car rental, and/or hotel applies), or
2) Directly from the Expense Module.

Traveler should certify that they have:
1) Received authorization to travel, and
2) Recorded business expenses – includes out-of-pocket expenses as well as Travel Card charges.
A conference brochure is required and should be attached to the Expense report, as applicable. The conference website is not sufficient as the conference website will most likely expire at some point, making it hard to reference. However, you make take a screen shot until a brochure is acquired or can manually add the pertinent information to the justification box (i.e. name of conference, date, location, meals provided).

If you have added Maria Mejias (IMS admin) as a delegate and will seek assistance preparing your expense report, please send her an email (maria.mejias@uconn.edu) when you have uploaded all your receipts and are ready for her to assist.

Meals While Traveling

When using the UConn Travel card, transactions automatically feed into the traveler’s “Available Expenses” queue within the Expense module. Traveler can claim reimbursement for the actual cost of meals (substantiated with original receipts) OR may claim reimbursement using the per diem method. Travelers MUST use one method of reimbursement for the entire trip. The total reimbursement for actual meal costs over the course of travel may not exceed the amount that would have been reimbursable based on daily per diem rates the same time period.

For business meals or entertainment expenses, you MUST identify all attendees associated with the expense. Attendees and attendee groups can be added to the system in the Expense Profile Settings.

Alcoholic beverages are not reimbursable. If an alcoholic beverage is found on a travel reimbursement as a meal expense the amount is deducted from the meal even if the meal amount falls within the daily limit rate.

Personal Car

Travelers using a personal car for business travel can be reimbursed using an established mileage rate, which is periodically updated and located on the Accounts Payable Website. PLEASE NOTE: Mileage is deducted from traveler’s daily commute from home to official duty stations. Travelers will also be reimbursed for trip expenses (e.g. tolls, parking).

Concur Mobile App

Simply download the app from App Store, Android or Microsoft App Store. The app will allow travelers to manage many of the request and expense related functions such as, capture and upload pictures of receipts, check and approve expense reports.
APPENDIX A

The following step-by-step guide created by UConn Travel will help to assist you in the process of in Submitting a Travel Request which contains segments (i.e., airfare, lodging, and/or car rental) and to seek pre-approval for Bradley Parking and Travel Advance.

CONCUR | SUBMITTING A TRAVEL REQUEST

OVERVIEW
Concur Request makes department budgeting, requesting travel, and submitting travel-related expenses easier with a pre-trip request and approval process.

An approved request is required, prior to booking travel, for every expense report that contains segments (i.e., airfare, hotel, and/or car rental). If a request isn’t submitted/approved prior to travel, a request must be submitted for approval post travel. Requests submitted post travel are routed for additional approval. This document provides an overview for submitting a travel request in Concur.

PROFILE SETUP
It is best practice to update your Concur profile with specific personal and account information. Profile information then populates respective fields throughout Concur, which minimizes manual input.

Refer to the Navigation and Profile Setup reference documentation for specific details.

LOGGING IN
1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.

START A NEW REQUEST
All UConn business travel (domestic and international) requires submission of a travel request in Concur, prior to booking travel.

1. From the Concur homepage, hover on the New icon. A menu of options displays.
2. Click Start a Request.

NOTE: Fields identified with a red bar are required. Complete all required fields.

REQUEST HEADER
The Request Header is the default tab that displays when creating a new request. Certain information, captured in the header, automatically feed to Segments, Booking, and Expense Reporting.

1. Request Policy. This field will default as appropriate.
2. Trip Name. Enter a brief and accurate description of the nature of the business trip.
3. Does trip include a Level 3 or 4 Country/Region? Level 3 or 4 Country/Region field is required. Refer to the Company Notes section in Concur for additional assistance with the Level 3 or 4 Country/Region dropdown.

NOTE: Many fields have a tool tip, identified with a hovering cursor/question mark. Hover over any tool tip for helpful information as you complete each field.

4. Business Travel Start Date and End Date. Enter the first day of your travel and the last day of your travel.
5. Trip Purpose. Make a selection from the dropdown, as appropriate.

Updated March 19, 2020
6. Destination City. Start to type the primary location where business is occurring (last or farthest). A live search result displays.

NOTE: To attach a document to a request, complete the remaining required fields and then Save the request. An Attachments dropdown displays. Click the Attachments dropdown and then click Attach Documents.

7. Select a valid option from the dropdown.

8. Enter additional destinations in the Business Purpose/Justification field.

NOTE: The segments tab also captures additional destinations, as necessary.

9. Traveler Type. This non-modifiable field defaults from your profile.

10. Trip Type. Make a selection from the dropdown, as appropriate. Segments include Air, Hotel, Car Rental or Rail.

NOTE: Puerto Rico and other U.S. territories will require an International Travel Type on the request header.

11. Will this trip include personal travel? If you are including additional time outside of business travel, select yes.

12. Personal Travel Dates. Complete this field, if personal travel = Yes.

a. If yes, at time of booking, the traveler should:
   - Call Key Travel/Anthony’s directly.
   - Obtain a business cost comparison.
   - Book Travel reservation with Key Travel/Anthony’s directly.
   - Cost comparison must be attached to expense report with submission.

NOTE: To attach a document to a request, complete the remaining required fields and then Save the request. An Attachments dropdown displays. Click the Attachments dropdown and then click Attach Documents.

13. How will you book this travel? Options in this dropdown are listed in recommended order.

14. Click the appropriate option from the dropdown.

Below is a list of booking options with brief descriptions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-line booking in Concur</td>
<td>This is the recommended method for all university business travel, excluding complex international travel. Exceptions may apply.</td>
</tr>
<tr>
<td>Agent-assist using UConn Travel Management Company (TMC)</td>
<td>This option requires calling a TMC agent to book business travel. Complex international business travel, often with multiple stops, will warrant this option. Other exclusions may apply.</td>
</tr>
<tr>
<td></td>
<td>NOTE: All agent-assist booked travel, using UConn TMC, incur an additional transaction fee.</td>
</tr>
<tr>
<td>Other (Outside UConn Travel Management Company and Concur)</td>
<td>This option is NOT RECOMMENDED. On an exception basis, when travel is booked outside of the Concur online booking tool, this option should be selected.</td>
</tr>
<tr>
<td></td>
<td>NOTE: When booking outside of Concur, expense reimbursement is not guaranteed. A request must be submitted via the Concur online booking tool post-travel, which is escalated for higher approval.</td>
</tr>
<tr>
<td>Non-Travel</td>
<td>Non-Travel requests include business meals. Other exceptions may apply.</td>
</tr>
</tbody>
</table>

15. Business Purpose/Justification. Enter a brief description stating the business purpose of travel.

NOTE(S): (1) Additional Business Purpose/Justification notes are required if multiple destinations are on the request.

(2) If split funding applies (e.g., OVP grant funding travel) and multiple justifications apply, traveler should include multiple justifications, even if attachment justification is required due to length of multiple justifications.

16. Account Number (and Account Organization related fields). This field should pre-populate to your

Updated March 19, 2020
APPENDIX B

The following step-by-step guide created by UConn Travel will help to assist you in the process of Booking travel, Lodging, and/or Car rental.

CONCURRE | BOOKING TRAVEL

OVERVIEW
Once you’ve obtained your supervisor/department approval to travel on behalf of UConn, you can book your trip. However, a fully approved Travel Request must be obtained, within Concur, prior to beginning all business travel.

This reference document covers best practices when using Concur to book airfare, car rental, and/or hotel reservations.

LOGGING IN
1. Navigate to any web browser.
2. Access Concur by clicking on the following Link: Concur SSO.

NOTE: If you’re a Travel Arranger, booking a trip on behalf of another traveler, click Profile and select that employee from the Acting as other user drop-down. Then click Start Session.

BOOKING TRAVEL
1. From the Concur homepage, navigate to the Trip Search section. The Air tab is selected by default.
2. Select a flight option (e.g., Round Trip, One Way or Multi-City).
3. Type a departure city, airport name, or airport code in the From field. Live search results display.
4. Click to select the preferred departure airport.
5. Type an arrival city, airport name, or airport code in the To field. Live search result display.
6. Click to select the preferred arrival airport.

NOTE: Use the Find an airport link or the Select multiple airports link, as needed.

7. Click in the Departure and Return date fields and select appropriate dates from the calendar.
8. Use the remaining fields in this section to define the appropriate time range.

9. If a car rental will be necessary for the reservation, click Pick-up/Drop-off car at airport checkbox.
10. If a hotel will be necessary for this reservation, click Find a Hotel checkbox, and then complete additional applicable Hotel fields.

NOTE: By default, flight search results will display Economy Fares listed by price. Modify Search by field to Schedule, as desired.

11. Click Search. Flight search results display.

NOTE: If personal travel is combined with business travel, a flight comparison must be obtained (at time of booking) from the preferred UConn Travel Management Company. Personal travel airfare difference charges must be charged to a personal credit card.

Updated March 30, 2020
SELECTING A FLIGHT

Flights are sorted by Price – Low to High, by default. Each fare option includes both the departure and return flight per result.

1. Scroll through the flight search results to locate a desired flight.

NOTES: (1) Click a specific airline and/or specify number of stops preferred from the top travel matrix, as desired. (2) To change flight search details, use the left navigation pane options.

2. Click View Fares.

Fare options and other flight details display.

3. Click the informational icons for any allowable flight to see applicable details for each option.

4. Click an allowable flight fare. The Review and Reserve Flight page displays.

REVIEW AND RESERVE FLIGHT

Scroll through the Review and Reserve Flight page to confirm accuracy.

5. Review flight details.

6. Review Traveler Information.

7. Edit or Add information, as necessary.

TIP: Traveler information will auto populate from the travelers profile, if available. See the Concur Navigation and Profile Setup documentation for details regarding Profile Setup.

8. Click Reserve Flight and Continue to confirm.

SELECTING A CAR RENTAL

If a rental car was requested with your initial trip search, the rental car search results display next.

UConn’s preferred car rental providers include Enterprise and National. If an alternate car rental company is used, you will need an Enterprise or National comparison from Key Travel.

1. Review car rental search result options.

TIP: To filter available options, click on vendor and/or a car size from the top matrix.

2. Scroll through the search results.

3. Click a Total Cost to make a Most Preferred Car Rental selection.

4. Review Rental Car details for accuracy.

NOTE: Business travel car rental charges should be charged to your Travel Card. A comparison from Key Travel must be obtained from the TMC if personal travel is combined with business travel. Personal car rental charge difference should be charged to your personal card.
5. Confirm the Rental Car Preferences and Driver Information details are complete and accurate. Edit as necessary.

6. Click Reserve Car and Continue. Search results for next segment display, as applicable.

**NOTE:** For any car rental reservation, that falls within a class that is not compliant to the travel policy, a price comparison (dated at the time of booking) must be obtained. Price comparisons should be attached to the respective expense report with the car rental expense.

For more information contact travel@uconn.edu, or the Accounts Payable team directly.

**SELECTING A HOTEL**

If a hotel was requested with your initial trip search, the hotel search results display next.

1. From the Hotel Per Diem Locations screen, confirm the Country, State, and Location fields have accurately repopulated based on the hotel details.

2. Click Next. The business/personal travel prompt displays.

3. Read through the business/personal travel prompt and then click OK. The Hotel search results display.

4. Review the hotel search result options.

5. Click View Rooms for the desired hotel. Hotel rate details and room options display.

6. Click the desired rate/room.

7. If the hotel selected exceeds 150% of the allowable Hotel Per Diem, additional information will be req

**NOTE:** If selecting a Hotel option that exceeds 150% of the allowable Hotel Per Diem for the location you are traveling to, additional information is required within Concur. Additionally, the traveler should obtain written approval from Dean/Director/Department Head.

![Hotel Per Diem Locations](image)

The Review and Reserve Hotel screen displays.

8. Review details for accuracy.

9. Confirm the Hotel Room Preferences and Hotel Guest Information details are complete and accurate. Edit as necessary.

10. Review the Rate Details and Cancellation Policy information.

11. Check the I agree to the hotel’s rate rules, restrictions, and cancellation policy box.

**ACCEPT RATE DETAILS AND CANCELLATION POLICY**

Please review the rate details and cancellation policy provided by the hotel:

Coast International Inn

- Please review the rate rules and restrictions before continuing.
- The hotel provided the following information:
  - RATE: USD 90.00
  - TOTAL RATE: 408.40 USD
  - EXTRA PERSON: $15.00

12. Click Reserve Hotel and Continue.

**TRAVEL DETAILS**

1. From the Travel Details screen,

**Travel Details**

- **Trip Overview**
- **Trip Start**
- **Trip End**
- **Travel Date**
- **Transfer**
- **Advance Notice**
- **Currency**
- **Airfare**
- **Add to your itineraries**

2. Scroll through each segment to review the trip details, including the total estimated cost of the trip.

3. Make any necessary changes.

4. Click Next. The Trip Booking Information screen displays.

![Travel Details](image)

Updated March 30, 2020
5. Review the **Trip Name**. Edit as desired.

6. Make the appropriate selection from the **Airfare charged to a Federal grant?** dropdown.

    **NOTE:** There is no option to hold a trip before booking. Airfare is not ticketed upon booking, rather a UConn travel agent will send a follow-up email with a ticket number once a seat is confirmed on a flight.

7. Click **Next**. The **Trip Confirmation page displays with details**.

8. To complete booking, scroll down to click **Confirm Booking**. **Trip details are sent to an agent for ticketing**.

9. Click **Finish**.

    **TIP:** Shortly after travel is booked, Concur will send an email to the traveler (and their delegate(s), if applicable) confirming travel details. Within 24 hours, Key Travel/Ahony Travel will send a separate email confirming ticketing number, and respective flight information, if a flight was booked.

---

**CANCELLING OR CHANGING AIRLINE, RENTAL CAR, OR HOTEL RESERVATION**

If an upcoming trip requires changes or cancellation, contact a UConn travel management agent for assistance.

---

**ADDITIONAL SUPPORT**

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to the Concur Training Reference Material.
APPENDIX C

The following step-by-step guide created by UConn Travel will help to assist you in the process of Adding a Delegate.

CONCUR | ADDING A DELEGATE

OVERVIEW

A Delegate is an individual designated in Concur to assist with tasks such as: creating and submitting Travel Requests, creating expense reports, approving Travel Requests and approving Expense Reports on behalf of another Concur user.

NOTE: To allow another user to book Travel on your behalf, within Concur, the traveler must identify the user as a Travel Assistant. Refer to the Navigation and Profile Setup reference document for additional Travel Assistant assignment information.

There are three (3) types of delegates:

1. A Preparer Delegate - can prepare/submit requests and prepare expense reports on behalf of a user.
   
   NOTE: (1) Preparer delegates cannot submit requests containing cash advances. (2) Preparer delegates will notify the traveler when an expense report is ready for review and submission, however they will NOT be able to submit the expense report on behalf of a traveler.

2. An Approver Delegate - can approve requests or expense reports on behalf of a user. (To be an Approver Delegate, you must already have the approver role).
   
   NOTE: An Approve Delegate can be assigned on a temporary or permanent basis.

3. A Previewer Delegate - can review submitted requests and expense reports on behalf of an Approver, however they will not be able to approve these requests or expense reports.
   
   TIP: Refer to the Working as a Delegate reference document for additional details.

HOW TO ADD A DELEGATE

The Travel Request and Expense Report modules within Concur share delegates. Therefore, by assigning permission(s) to a delegate, you are assigning permissions for another user to access and assist with your Concur Profile, Travel Requests, and Expense Reports.

Below is a list of the steps you will take in your Concur profile to add a preparer or approver delegate.

1. Navigate to any web browser.
2. Access Concur by clicking on the following: Concur SSD.
3. From the Concur homepage, click Profile and then click Profile Settings.
4. On the left of your screen select Request Delegates.
5. Click Add and then type in your search information.
   
   TIP: You can search by employee name, email address, employee id or login id.
6. Once the name you are searching for appears, verify all the information is correct. A filtered dropdown list of matching names displays.
7. Click on the desired name in the dropdown.
8. Click the check boxes to assign the permission you would like to give to each delegate.

Below is a table listing available permissions and a brief description of each.
The following step-by-step guide created by UConn Travel will help to assist you in the process of Creating an Expense Report.

CONCUR | CREATING AN EXPENSE REPORT

OVERVIEW
This document provides instruction for creating an expense report, to reconcile business related expenses incurred during a past business trip.

Expense Reports should be submitted within 14 days of returning from a business trip.

LOGGING IN
1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.

CREATING AN EXPENSE REPORT
Expense reports can be created a couple ways:
- From an approved request in the Request Module, when Air, Car Rental, and/or Hotel applies, or
- Directly from the Expense Module.

Starting from an Approved Request
UConn related business travel, that includes Air, Car Rental, and/or Hotel, must have a Travel Request (within Concur) submitted and approved before the start of that trip.

After returning from a business trip, an expense report that includes Air, Car Rental, and/or Hotel must be created from the respective, approved Concur request.

1. From the Concur homepage, click Requests from the ribbon. A list of travel requests display.
2. Locate the appropriate approved request.

   TIP: If there are multiple requests to add to the same expense report. See the Linking an Approved Request section of this document.
3. Click the Expense link - found with an approved Request.

4. The expense report is created, auto-filling most of the report header fields from the linked request.
5. Review the fields that automatically feed over from the linked Travel Request.
6. Update the Personal Travel fields. If Personal Travel is Y, specific dates should be entered in the Personal Travel Dates field.
7. Enter a Travel Award No. when applicable.

NOTE: When applicable, UCPEA/AAUP award letter must be attached to expense report prior to submission.
8. Update any other header fields, as necessary.
9. Click Next. The Are you claiming meal or lodging per diem pop up displays.
10. Click Yes, if lodging or meal expenses will be included with the expense report. The Travel Allowances window will display.

Starting from the Expense Module
Business travel that does NOT include Air, Car Rental, and/or Hotel, does NOT require a pre-approved Concur request.

NOTE: if an approved request was obtained prior to travel, refer to the approved request to build the expense report.

2. Complete the required report header fields, identified with a red bar to the left of each field.
3. Complete optional fields, as necessary.

Updated April 29, 2020
NOTE: To link an approved request to an existing expense report, navigate to the Available Requests section on the Report Header, and then click Add. Click to check the approved request(s) and then click Add.

**TRAVEL ALLOWANCES | ITINERARIES**

Travel allowances include Lodging and Meal Per Diems. Travelers may claim meal per diem, or individual actual meals, as permitted by their funding source. Refer to the UConn Travel Policy for additional details.

Below are itinerary options available, which determine the travel allowance for each day of business travel.

**Available Itinerary**

Use this option when travel was booked through Concur/UConn’s TMC.

1. Click the Available Itineraries tab.
2. Select an available itinerary and then click Assign.

The selected itineraries display within the Assigned Itineraries section.

3. Click Next>>.

**Import Itinerary**

Use this option when travel was booked outside of Concur/UConn’s TMC and the itinerary was forwarded to plans@concur.com.

NOTE: The email address, used to forward an external itinerary, must be verified through the traveler’s Concur Profile.

---

**Create Itinerary**

Use this option when travel was booked outside of Concur/UConn’s Travel Management Company (TMC) and the itinerary was not forwarded to plans@concur.com.

1. On the New Itinerary tab, enter details for the first leg of your trip.
   a. **Departure City.** This should reflect the city you depart from.
   b. **Date and Time.** Enter details for the same day of travel.

**NOTE:** The dates on each itinerary stop are usually the same, as a traveler generally departs and arrives on the same date.

2. **Arrival City.** This should reflect your destination city.
3. **Click Save.**
4. Repeat the steps above, for your return itinerary.
5. If this is a multi-destination trip, additional itinerary stops may be needed.

---

**TRAVEL ALLOWANCES | EXPENSES & ADJUSTMENTS**

1. Click to indicate any meals that were provided during your trip, as necessary.
2. **ALWAYS** click the Use Percent Rule checkbox for each date of travel.

**NOTE:** The Use Percent Rule allows Concur to calculate 150% of the published lodging GSA rate.

3. **Click Create Expenses.** Meal Per Diem displays as individual line items on the expense report.

**NOTE:** To modify individual Meal Per Diem expense items from an open expense report, click the Details dropdown, and then click Expenses & Adjustments.

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Updated April 29, 2020
**ADDING TRAVEL CARD TRANSACTIONS**

When using the UConn Travel Card, transactions automatically feed into the travelers Available Expenses queue within the Expense module.

Imported travel card transactions will minimize data entry – automatically creating an expense line item, populating required fields, etc.

**From the Open Expense Report**

1. Click **Import Expenses**. A list of **Available Expenses** display.
2. From **Available Expenses**, select the check box (es) for the appropriate expenses.
3. Click the **Move** dropdown and then select **Current Report** or **New Report**.
4. Verify or update the Expense Type classification of the imported credit card transactions.
5. Additional details or receipts may be required.

**TIP:** Select the top checkbox to quickly mark all available expenses.

**NOTES:**
1. If you select an existing report, the report opens and the selected transactions are attached to the report.
2. If you select **New Report**, the Create New Report page appears for you to complete the information, as applicable.

6. Verify or update the Expense Type classification of the imported credit card transactions.
7. Additional details or receipts may be required.

**ADDING OUT-OF-POCKET EXPENSES**

Out of Pocket expenses must be added manually from within an open expense report.

1. From the open expense report, click + **New Expense**.

**The New Expense tab displays.**

2. Select the appropriate **expense type** from the options available. The page refreshes, displaying the fields respective to the expense type selected.
3. Complete all required fields marked with a **red bar**.
4. Complete optional fields, as necessary.
5. As necessary, click any of the following:
   a. Click **Itemize** (to itemize the expense).
   b. Click **Allocate** (to allocate the expense to one or more accounts).
   c. Click **Attach Receipts** (to upload and attach receipt images).

**ITEMIZING EXPENSES**

**Hotel Lodging: Itemizing Nightly Lodging Expenses**

A hotel bill typically contains a variety of expenses which may include nightly room charges, nightly room taxes, parking, meals, etc. You must itemize these expenses as they appear on the hotel folio to ensure your reimbursement is processed in a timely manner.

1. With the expense report open, select **Hotel Lodging** from the expense type listing. The **Hotel Lodging related fields display to the right**.
2. Complete the required form fields.
3. Click **Itemize**. The **Nightly Lodging Expenses tab display**.
4. Complete the **Nightly Lodging Expenses** required fields.
5. Enter the Room Rate (per night) and Room Tax (per night), as identified on the hotel folio.

**NOTE:** If the nightly room rate differs, use the first evening room rate in the initial itemization, and then modify each expense line item (and respective nightly tax) to reflect the true nightly rate/tax after Concur creates the nightly lodging expense sub-entries.

6. Click **Save Itemizations**.

7. If the hotel lodging expense has a remaining/outstanding amount, continue to select expense types and itemize amounts appropriately until the balance is $0.00.

**NOTE:** The total amount of the folio transaction, the itemized amount, and the remaining amount appear on the right side of the page, until the remaining amount is $0.00.

8. For Personal/Non-Reimbursable expenses, mark the expense item/portions of the expense as a **Personal/Non-Reimbursable** expense type.

**NOTE:** If a traveler is claiming meals per diem, any meals charged to the hotel room must be itemized under the Personal/Non-Reimbursable.

9. When done, all itemizations appear (on the left), below the parent expense.

**NOTE:** Hotel deposits made prior to the hotel will be listed on the final itemized hotel folio. Each charge listed on the hotel folio must be itemized under a Hotel Lodging expense line item (e.g., nightly rate, taxes, hotel deposit [when applicable] parking, laundry, room service, etc.). Itemize the hotel deposit using the **Hotel Lodging Deposit** expense type, ensuring the amount is entered as a negative number (for example, if the deposit was $100, enter the amount as -100 in the hotel lodging deposit amount field).

---

**Itemizing partially Non-Reimbursable Expenses**

Itemize any expense that includes both business and personal expenses, or that is only partially funded, therefore requiring some out of pocket (Non-Reimbursable/Personal) contribution.

For example, you have a parking expense for $200. A portion of this expense was incurred during business travel, however, a portion of the parking expense was incurred during personal time taken after the business trip. In this scenario, you should create a parking expense line item for the total transaction amount, and then itemize the expense creating two itemizations: one, under the parking expense type, for the amount incurred during the day(s) of business travel, and one, under the Personal/Non-Reimbursable expense type, for the remaining amount of the transaction, incurred during the day(s) of personal travel.

1. Click to select an existing expense item from the list of items on the expense report.

   ![Expense Report](image)

   **The expense item details display to the right of the view.**

2. Click **Itemize**.

   ![Itemize Button](image)

   **The expense tab label changes to Itemization.**

3. From the available dropdown, select the **Expense Type** that applies to the first itemization.

---

**UPDATE:** Updated April 29, 2020
The page refreshes, displaying the respective fields for the selected expense type.

4. Complete the **required fields** (with red bar), and then any optional fields, as needed.

5. Click **Save**. The newly created itemization appears as a subentry, nested under the parent expense entry (on the left of the screen).

6. Select another expense type to itemize the next line item, and then complete the required fields.

7. For Personal/Non-Reimbursable expenses, mark the expense item/portion of the expense as a **Personal/Non-Reimbursable** expense type.

8. When done, all itemizations appear (on the left), as sub-entries, below the parent expense.

---

**ALLOCATING EXPENSES**

The Allocation feature allows you to allocate selected expenses to multiple funding accounts.

**Allocate a Single Expense**

1. With the report open, select an expense (left side). The expense details display to the right.

2. Click **Allocate** from the bottom of the Expense tab (right side).

**Allocate Multiple Expenses**

1. Select the checkboxes for the appropriate expenses on the left side of the page.

2. Click the **Allocate** link (right side).

---

**TIP**

The Allocation Total, Allocated, and Remaining amounts are displayed at the top of the Allocations view. The total amount must be allocated 100%, otherwise an audit rule is triggered and you will not be able to submit the report.

7. When allocations are complete, click **Save**. A confirmation pop-up displays.

8. Click **OK** to confirm.

9. Click **Done**. The allocation icon appears with the expense.

10. From the main expense report line item view, hover on an allocation icon to see details, as desired.

---

**ADDING ATTENDEES TO A BUSINESS MEAL**

For business meals or entertainment expenses, you must identify all attendees associated with the expense. Users can add attendees and attendee groups to the system in the Expense Profile Settings.

When selecting the expense type **Business Meals/Hospitality <10**, all attendees must be listed. When selecting the expense type **Business Meals/Hospitality**
>10, the event functionality within the expense type should be used. Creating an event allows you to specify the number of attendees, rather than listing out the individual names.

Refer to the Creating a Business Meal Expense section of the Non-Travel Expense Report documentation for additional business meal expense details.

**ENTERING PERSONAL CAR MILEAGE**

Personal car mileage expenses should be submitted for use of a personal vehicle for business miles driven.

1. From the open expense report, click + New Expense.

   ![New Expense](image)

   The New Expense tab displays.

1. Click Personal Car Mileage from the list of expense types. A Google Maps mileage calculator window displays with the traveler’s home address automatically populated in field “A”.

   ![Mileage Calculator](image)

   **NOTE**: If home address is not saved in the traveler’s profile, it must be entered manually with each personal mileage expense to appropriately deduct commute.

2. Confirm field “A” reflects the starting point of your trip. Modify field “A” as necessary.

   For example, if you leave your home and travel to a destination other than your duty station, field “A” should contain your home address. However, if you are starting from the office, to a secondary location, field “A” should reflect your office address.

3. Enter the destination address in field “B” and then tap TAB from your keyboard. Google maps mileage between the waypoints is calculated and an additional field displays.

4. Enter additional waypoints for the trip, as necessary.

5. Review the calculated route displaying on the map. Manually drag the line between points to modify the route you drove, as necessary.

   ![Map](image)

6. Click Deduct Commute to subtract one way of your typical work commute from the total business mileage. Deducted Commute Distance fields for Home and Office display.

   **NOTE**: If the traveler enters their home and work addresses in their travel profile, they will automatically populate when the Deduct Commute box is checked.

7. Review the Home and Office fields, update as necessary.

8. Click Deduct Round Trip your typical round trip commute from the total business mileage.

   **NOTE**: Check Deduct commute when your trip begins at your home address, directly to your trip destination, bypassing your duty station. Deduct Round Trip should be checked off when you are not returning to your duty station for the day.

9. Click Add Mileage to Expense.

10. Complete the Transaction Date field and then click Save. Personal Car mileage expense item is added to the expense report with the calculated reimbursement amount based on the date, miles driven, and the predefined reimbursement rate.

   **NOTE**: If daily mileage expenses are incurred, expense reports should be created on a weekly or monthly basis, rather than daily. Individual line items should be created for each day’s personal mileage expense.

Refer to the Creating a Personal Car Mileage Expense Report document for additional details.
FOREIGN CURRENCY TRANSACTIONS

Transactions incurred during international travel should always be billed in the local currency to ensure the currency conversion within Concur is accurately calculated (including conversion rates, taxes, etc.).

**TIP:** The City of Purchase field drives the expense currency. For example, if City of Purchase is Dublin, Ireland, the following displays:

For out of pocket expenses:
1. Update the X Rate, when necessary and when you know your exchange rate, OR
2. Alternatively, update the =Amount in USD to instruct the system to accurately calculate the correct exchange rate.

NOTE: Refer to the Adding out of Pocket Expenses section of this document to create the expense item.

For travel card expenses:
With transactions billed in local currency (e.g., travel to Japan billed in YEN) will automatically convert to USD within Concur.
1. Review the details of the transactions, confirming the conversion to USD is accurate. No manual adjustment should be required within Concur.

NOTE: If the travel card transaction feeds into Concur in USD, but the traveler's receipt is in local currency (i.e., a currency other than USD), manual adjustment within Concur will be required.

Additional support is always available by contacting travel@ucconn.edu or Accounts Payable for additional instruction.

RECEIPTS

Concur is configured to comply with the receipt requirements, as per the Travel and Expense policy. Receipts can be sent to your available receipt queue to be attached to an expense report at a later date, via email or through the Concur mobile app.

**Required Receipts**
Expense transactions that require receipts can be identified by the Receipt Required icon next to the item in the expense list.

Email Receipts
Before emailing receipts to the Available Receipts library, you must verify your email address in the Personal Information section of your Profile.

Profile Setup | Email Verification
1. Click Profile > Profile Settings. The Profile Options page appears.
2. Click Personal Information from the left navigation pane. The Personal Information screen displays.
3. Scroll down to the Email Addresses section and click Add an Email Address.
4. Follow the below steps to verify your email address:
   a. Once you have saved an email address, click Verify.
   b. Check your email for a verification message from Concur.
   c. Copy the code from the email message into the Enter Code box next to the email address.
   d. Click OK to submit the code and complete verification.
5. Address your email to receipts@concur.com, attach a single receipt image, and send the email.
6. Alternatively, for automated expense itemization, address your email to receipts@expensesit.com, attach a single receipt image, and send the email.

NOTE: Receipt file formats must be one of the following: PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF. Maximum file size cannot exceed 5MB, per receipt.

Allow your delegate to send receipt images to your Available Receipts library
The Delegate may send receipts to receipts@concur.com or receipts@expensesit.com as long as both the User and Delegate have verified their email addresses within their own profile.

When emailing receipts on a delegate's behalf, the delegate must replace the subject line with the User's primary (verified) email address.

**TIP:** See How to Add a Delegate documentation for additional delegation permission details to allow a delegate to Prepare and View Receipts.
Upload Receipts from your Computer
Files saved to a folder on your computer may be uploaded directly into an Expense Report using the following steps.

1. Scan the documentation. Save to a folder on your computer.
2. Click Expense (from the top ribbon).
3. Scroll to the bottom of the Manage Expenses view.
5. Click Browse.
6. Locate the desired image(s), select, and click Open.
7. Click Upload. The image(s) is/uploaded.
8. Click Close. The image is then available to be attached at any time.

Attach an Available Receipt to an expense entry
1. In the Expense Report, select an expense entry. Expense details display to the right.
2. Click the Receipts dropdown and then select View Available Receipts. Available receipt images display.
   a. Click the left-pointing arrow icon on the appropriate image, OR
   b. Drag the receipt image directly over the expense entry
   The receipt image is attached to the expense entry.
3. Confirm that the receipt is attached by noting that the [yellow] Receipt Required icon has changed to a [blue] Receipt Received icon.

MISSING RECEIPT AFFIDAVIT
A Missing Receipt Affidavit can be generated for a transaction missing a receipt, however the expense transaction details require a receipt.

Only the owner of an expense report can create a Missing Receipt Affidavit. I.E., a delegate CANNOT create a missing receipt affidavit on behalf of another traveler.

NOTE: The missing receipt affidavit cannot be used for a trip segment – i.e., Airfare, Hotel, Car Rental, Amtrak Rail.

1. To attach a missing receipt affidavit, click the Receipts link and then click Missing Receipt Affidavit.

The Missing Receipt Affidavit pop-up displays.
2. Click to select the applicable expense transaction.
3. Click Accept & Create.

RESOLVING EXCEPTIONS
Audit rules are built into Concur, compliant with the travel policy and procedures, ensuring employees are in line with the travel policy and universities best practices. Exception warnings and/or hard stops will display if a traveler violates any of the audit rules built into Concur. Yellow warnings are “soft” stops and designed to warn the traveler. Yellow warnings do not prevent a traveler from submitting for approval. Red warnings are “hard” stops. The red warnings must be resolved before submitting for approval.

Exceptions display at the top of the request and/or expense report page.

UCONN UNIVERSITY OF CONNECTICUT

Updated April 29, 2020
COPYING AN EXPENSE

Recurring business expenses can be copied from a previous expense and then updated for the new expense item.

1. With the expense report open, select the expense you want to copy.
2. Click Copy.
3. Click to open the copied expense.
4. Review the details of the expense to confirm accuracy for the new expense item.
5. Modify applicable fields for the new expense where allowed, as necessary.

NOTES: (1) All allocations, attendees, expense-level comments, and value added tax (VAT) details from the original expense are copied to the new expense. (2) Credit card information, e-receipts, mobile entry information, and travel segments (associated with travel itineraries) from the original expense are NOT copied to the new expense.

6. Once updated, click Save Expense.

FRAUDULENT CHARGES

Travel card charges identified as fraudulent must be rectified by the cardholder. Fraudulent charges should be submitted with the travelers next expense report, netting out the fraudulent charge with the respective credited item. If fraudulent charges exist, but there is no travel expected (therefore no expense report in the near future) – contact travel@uconn.edu.

1. Add fraudulent charge.
2. Add credit for fraudulent charge.

SUBMITTING YOUR REPORT

2. Review the information for accuracy, and then click Submit Report. The Report Status window appears.
3. Click Close.

NOTE: If you have not met policy requirements when completing the details of your report, a message will display describing the report error or alert. Correct the error, or if you require help to complete the task, contact your Concur administrator.

CORRECTING AND RESUBMITTING AN EXPENSE REPORT

If you an expense report is returned to you by an approver, you will need to correct and resubmit the report for approval and reimbursement. The approver will include a comment explaining why the report was returned.

4. Open the report, from the Concur home page Quick Task Bar, click the Open Reports task.
5. Click the Returned tile to view the returned report.
6. Review the approver’s comment appears below the amount.
7. Make the requested changes, and then click Submit Report.

ICON INDEX

A variety of key Concur icons are listed below with a brief description.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Icon" /></td>
<td>Receipt Image Required</td>
<td>This indicates that a receipt is required with the selected expense line entry.</td>
</tr>
</tbody>
</table>

Updated April 29, 2020
<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Receipt Attached</td>
<td>This indicates that a receipt has been attached to the respective expense line item.</td>
</tr>
<tr>
<td></td>
<td>Missing Receipt Affidavit</td>
<td>This indicates that a missing receipt affidavit has been attached to the expense item, in lieu of a vendor receipt.</td>
</tr>
<tr>
<td></td>
<td>Travel Card Used</td>
<td>This indicates that an expense entry originated from a University Travel Card transaction. This transaction automatically feeds into the travelers Concur imported expense queue.</td>
</tr>
<tr>
<td></td>
<td>ExpenseIT Receipt</td>
<td>This indicates an expense entry that was created by sending a receipt to <a href="mailto:receipts@expenseit.com">receipts@expenseit.com</a>.</td>
</tr>
<tr>
<td></td>
<td>Mobile Expense</td>
<td>This indicates the expense line item was created via the Concur Mobile App.</td>
</tr>
<tr>
<td></td>
<td>Personal Expense</td>
<td>This indicates an expense that was marked Non-Reimbursable/Personal (by the traveler).</td>
</tr>
<tr>
<td></td>
<td>Itemized Expense</td>
<td>This indicates the expense entry has been itemized (e.g., Hotel expenses). Itemized expenses can be expanded to display nested sub-entries for additional detail.</td>
</tr>
<tr>
<td></td>
<td>Alert</td>
<td>This indicates that an exception exists. This exception does not prevent submission.</td>
</tr>
<tr>
<td></td>
<td>Hard Stop Exception</td>
<td>This indicates that an expense entry or report contains an exception that will prevent submission.</td>
</tr>
<tr>
<td></td>
<td>Full Allocation</td>
<td>This indicates that the expense item has been fully allocated between multiple accounts.</td>
</tr>
<tr>
<td></td>
<td>Comment</td>
<td>This indicates that a report or individual expense item contains a comment.</td>
</tr>
</tbody>
</table>

**ADDITIONAL SUPPORT**

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to https://concurproject.uconn.edu/home/
APPENDIX E

The following step-by-step guide created by UConn Travel will help to assist you in getting the Concur Mobile App.

PLEASE NOTE: This is an optional feature.

CONCUR | MOBILE APPS

OVERVIEW

This document provides information on Concur mobile travel options including, TripLink, TripIt® Pro, and Concur Mobile.

NOTE: All features in this document are optional for use, and intended to enhance the traveler’s travel and expense related experience.

CONCUR MOBILE APP

The Concur Mobile app compliments the Online booking tool, allowing you to manage many of the request and expense related functions such as:

- Enter expenses. Start entering your expenses while you are still travelling.
- Capture and upload pictures of receipts for easy auto filling expenses.
- View Travel Card transactions. Automated feed as you complete transactions.
- Submit expense reports.
- Check the status of expense reports.
- Approve expense reports.
- COMING SOON! - Location Ping. Pinpoint your location with the click of a button to facilitate Duty of Care in an Emergency.

GETTING THE CONCUR MOBILE APP

1. Navigate to any web browser.
2. Access Concur by clicking on the following: Concur SSO, or navigate directly to the Travel Services website.
3. Click Profile at the top right corner of the page.
4. Click Profile Settings below your name.
5. At the top right of the screen click Concur Mobile Registration.
6. Enter your email address in the box provided and click Get Started to receive the link to download the app.
7. Click the link below that states create a Concur Mobile PIN.
8. Choose a 4 digit PIN and enter it in the box provided, then enter it again below.

NOTE: You can also reset your Concur mobile app password using the link from the profile page.


SIGNING INTO THE CONCUR MOBILE APP

1. After you have downloaded the app to your mobile device, click the icon to launch the Concur Mobile App.
2. On the sign in page you will be prompted to enter your Username: NetID@uconn.edu (e.g., mam18076@uconn.edu)
3. Click Next.

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4. On the Next screen, enter your Pin and then click Sign in to Concur.

NOTE: Your Pin should be setup in your Concur Profile before entering it in the mobile app.

NOTE: Concur will not let you sign in if your device does not have a passcode or if your device has been modified to remove manufacturer restrictions.


TRIPIT PRO APP

The Tripit® Pro app is designed to enhance your total travel experience. Tripit® Pro is your ‘one stop shop’ travel organizer that monitors flights, sends you notifications about upcoming travel, flight delays, lets you know if better seats become available, and more - so travelers are always in the know, on the go.

Tripit® Pro offers:

- **Seat Tracker**. Lets you know if a better seat becomes available.
- **Check-in Reminder**. Gives you a heads up 24 hours before your flight.
- **Alerts**. Notifications about your trip.
- **Flight Status**. Sends you real-time flight alerts throughout your trip.
- **Go Now**. Tells you when you should leave for the airport.
- **Security Wait Times**. Lets you know how long it'll take to get through security.

Visit https://www.tripit.com/web/sap-concur for more information on how to download and use the Tripit® Pro App.

ADDITIONAL SUPPORT

For help with Concur, contact travel@uconn.edu. For additional reference material, refer to https://travel.uconn.edu.

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Updated March 19, 2020