



Travel – Process Overview



New ways to Contact Us:

<https://travel.utah.edu/>



MESSAGE US ON TEAMS



SUBMIT A TICKET

Travel Advisor Contact Information

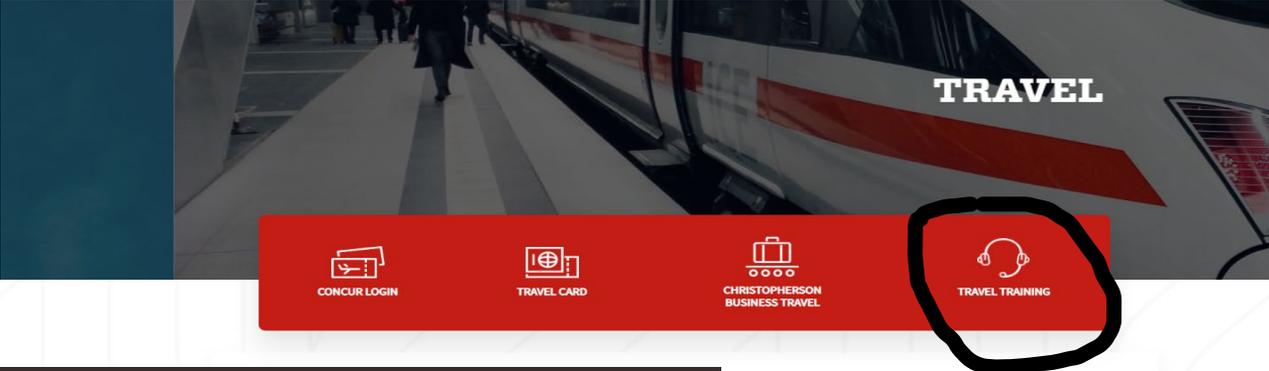
Email: uofutavel@cbtravel.com

Phone: 308-920-4417



New Training

Travel.Utah.edu



FILTERS:

SEARCH BY KEYWORDS:

FILTER BY CATEGORY:

FILTER BY TOPIC:

FILTER BY FORMAT:

- TUTORIAL VIDEO
- WRITTEN GUIDE
- ONLINE COURSE
- INSTRUCTOR-LED COURSE

FILTER BY ROLE:

CLEAR ALL FILTERS

TRAINING AND RESOURCES

Sort by

Act as a Delegate (Arranger) Video

TRAVEL
TRAVEL ARRANGER

Tutorial Video
2 minutes
This video covers how to act as a delegate (arranger) in Concur.
OPEN VIDEO

Add an Additional Review Step Tip Sheet

TRAVEL
APPROVER

Written Guide
This written guide covers how to add an additional review step for an expense report in Concur.
VIEW PDF

Add an Additional Review Step Video

TRAVEL
APPROVER

Tutorial Video

Add and Manage Delegates Video

TRAVEL
TRAVEL ARRANGER TRAVELER

Tutorial Video



Keywords/Concur Modules

- **Request:** Created before a trip as a form of registration. Creation is required by policy for any University business related trip. Translates and links provided information to an expense report.
- **Booking/Travel:** Tab used to secure transportation and lodging reservations for a travel.
- **Expense Report:** Submitted upon the return of a traveler. Used to facilitate reimbursement and reconciliation of trip related transactions.
- **Delegate/Arranger:** Terms commonly used on campus to describe someone who completes travel arrangements on behalf of someone else. Access can be granted via request to travel office or by the traveler themselves.

Workflow

Request – Booking - Expense

The screenshot displays the SAP Concur user interface. On the left, a navigation menu is open, showing a 'Home' dropdown and a list of 'APPLICATIONS' including Requests, Travel, Expense, Approvals, Reporting, Travel Reports, Intelligence, and TripLink. Below the menu is a 'Create' button and the University of Utah Finance logo. The main dashboard features a scenic background image of a lake and mountains. A row of five metrics is displayed: Authorization Requests (10), View Trips (0), Available Expenses (0), Expense Reports (1), and Cash Advances (0). A blue banner at the bottom of the dashboard mentions a 'subscription to Triplt Pro, provided by your employer' with links to 'Learn More and Activate' and 'Not right now'.

Note: Its important to first ensure you are on the correct profile before starting the process.

Request

Create New Request



* Required field

Type of Request *

*University Travel Request

*Request/ Trip Name *

*Request/ Trip Business Start Date *

MM/DD/YYYY

*Request/ Trip Business End Date *

MM/DD/YYYY

*Destination City *

*Destination Country *

Search by Country/Region

*Trip Type *

*Request/Trip Purpose *

Will this business trip include personal travel? * ?

Personal travel dates ?

*Traveler Type *

Employee

*How will you reserve air, car and/or hotel? *

Additional trip Purpose Information

0/500

Non-employee First (as appears on govt-issued ID)

Non-employee Middle (as appears on govt-issued ID)

Non-employee Last (as appears on govt-issued ID)



Request

Things to Know

- International requests must be registered 3 weeks prior to the start date of the trip
- Excepted expense is required for submission this is generally used as a placeholder
- If the book with agents option is selected provide flight information either on expected expense or comments section
- A majority of the information on a request can be adjusted on the expense report.

Booking

Options

- Book via Concur
- Book with Travel Agents
- Out of Pocket

Travel Advisor Contact Information

Email: uofutavel@cbtravel.com

Phone: 308-920-4417

24-Hour Help: 888-739-7011; Reference Code: COZ-UNIVERSITY OF UTAH

Office Hours: Monday-Friday 8:00 a.m. to 5:00 p.m.

Home ▾

Home

APPLICATIONS

Requests

Travel

Expense

Approvals



Trip Search

Booking for myself | Book for a guest



STOP! Do not book travel until you make certain that the first, middle, and last name(s) in your Concur Profile are identical to the government-issued ID you'll be presenting at the airport.

Trip Search is for **INDIVIDUAL employee domestic or international travel**. Use the Travel Agency forms on the UTravel website to book group travel, non-employee travel, employee + guest(s), or to use a personal credit card.

Airfare booked in Concur is **instant purchase/auto-ticketed** and charged to the UTravel dept card. All reservation changes must be done by a UTravel advisor with Christopherson Business Travel.

Flight Search

Round Trip | One Way | Multi City

From

Departure city, airport or train station

[Find an airport](#) | [Select multiple airports](#)

To

Arrival city, airport or train station

[Find an airport](#) | [Select multiple airports](#)

Search

Show More

Expense Reports - Navigation

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Report

- Report Header
- Report Totals
- Report Timeline
- Audit Trail
- Allocation Summary
- Report Payments
- Linked Add-ons
- Manage Requests
- Manage Cash Advances

- Report Header -> adjust trip dates, trip type, leave comments
- Report Totals -> shows amounts due employee vs company card
- Report Timeline -> approval flow of the report
- Allocation Summary -> chartfield the expense report is being charged to
- Manage Requests -> add/link an approved request to an expense report
- Audit Trail -> who made changes to the report



Expense Reports

Add Expense to Report

Available Expenses (0) [New Expense](#)

Select an expense type for the new expense

Search by expense type, category, description

- Recently Used
 - Hotel
 - Personal Car Mileage
 - Per Diem Reduction
 - Actual Daily Meals
 - Group Meals/Entertainment <10
- 01. Travel Expenses
 - Hotel
 - Hotel Deposit or First Night Deposit
 - Hotel-Group
 - Incidentals
 - Non-Conventional Lodging
 - Travel Insurance
- 02. Transportation

[Add Expense](#)
[Edit](#)
[Delete](#)
[Copy](#)
[Allocate](#)
[Combine Expenses](#)
[Move](#)

View: Detail

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Transaction Date	Enter Vendor Name	Additional Information	City of Purchase	Amount	Date	
<input type="checkbox"/>	⚠		Out of Pocket	Daily Per Diem Meals	10/05/2024			New York, New York	\$65.25	10/05/2024	...
<input type="checkbox"/>	⚠		Out of Pocket	Daily Allowance (Incidentals)	10/05/2024			New York, New York	\$3.75	10/05/2024	...
<input checked="" type="checkbox"/>	⚠		Out of Pocket	Ground Transportation	10/05/2024	Uber		Salt Lake City, Utah	\$24.00	10/05/2024	...
<input type="checkbox"/>	⚠		Out of Pocket	Daily Allowance (Incidentals)	10/04/2024			New York, New York	\$5.00	10/04/2024	...
<input type="checkbox"/>	⚠		Out of Pocket	Daily Per Diem Meals	10/04/2024			New York, New York	\$87.00	10/04/2024	...
<input type="checkbox"/>	⚠		Out of Pocket	Daily Allowance (Incidentals)	10/03/2024			New York, New York	\$5.00	10/03/2024	...
<input type="checkbox"/>	⚠		Out of Pocket	Daily Per Diem Meals	10/03/2024			New York, New York	\$87.00	10/03/2024	...

Travel Allowance - (per diem)

Start Location *
Salt Lake City, Utah

Start Date *
10/12/2022

Start Time *
5:00 AM

+ Add Destination

Arrival Location *
Denver, Colorado

+ Add Destination

End Location *
Salt Lake City, Utah

End Date *
10/16/2022

End Time *
9:00 PM

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Reimbursement Amount
All Days Dates: 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Wed, 10/12/2022 Denver, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25
Thu, 10/13/2022 Denver, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.00
Fri, 10/14/2022 Denver, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$43.00
Sat, 10/15/2022 Denver, UNITED STATES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sun, 10/16/2022 Denver, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25
Total:						\$220.50



Travel Allowance

Add Travel Allowance

Edit Travel Allowance

Edit Adjustments

Delete Travel Allowance



Expense Reports Best Practices



- Start your Expense report from an approved Request.
- Create the report as soon as you have an available expense.
- Verify the payment methods of your transactions (out of pocket vs company card).
- Alcoholic beverages may not be purchased using state-appropriated or federal funds, so these charges must be deducted and/or allocated correctly.
- If reimbursement is involved ensure the report is being submitted under the correct profile.
- Ensure all expenses are allocated to the correct chartfield before submitting the report.



Tips & Tricks

Mobile App

- Best way to upload receipts on the go

Print/Share

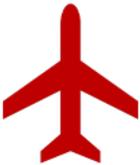
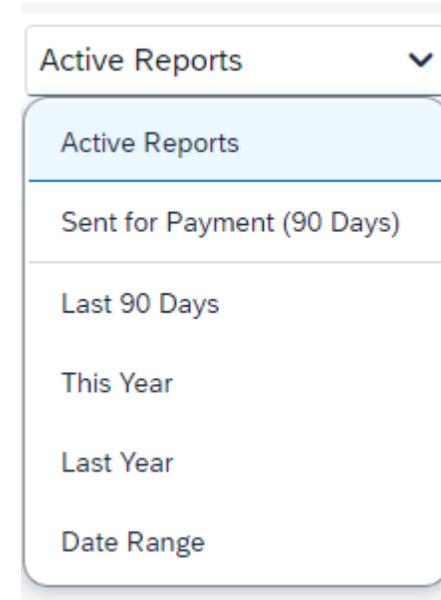
- Downloadable detailed summary of expense report
- Receipts included

Delegation

- Profile settings -> Expense Delegates
- View/adjust who you are a delegate for and add delegates to your profile

View:

- Found under request and expense tabs



Thank You!

Further Questions

Melaney McKellar: melaney.mckellar@admin.utah.edu

Miles Stump: miles.stump@admin.utah.edu



FINANCIAL SERVICES

THE UNIVERSITY OF UTAH

Your Partner in Financial Success

