NAVIGATING CONCUR

Starting a Travel Request to Submitting a Travel Report
KEY POINTS

- Submit your travel request & wait for approval BEFORE booking your travel
- Add Ashlee Clark to the approval flow (Requests & Reports)
- Attach an at-a-glance schedule or memo (if there is no schedule provided) to the expense report
- Change the speed chart number if you are not traveling with your home dept. & add the approver of the speed chart in the approval flow
- In order to get Government Rates within Concur, please check the “Government” Travel Preference box within your profile
- Import your travel expenses that you booked in Concur to the expense report
- We do NOT need a travel request if you are not requesting reimbursement for travel expenses. To request permission to leave campus, fill out the paper travel request form
COURSE PLOTTING:

- Slides 4-5: How to get to Concur
- Slides 6-16: Travel Request
- Slides 17-23: Booking travel & Profile Settings
- Slides 24-27: Travel Report
- Slides 28-36: Per Diem
- Slides 37-40: Attaching your Agenda
- Slides 41-51: Importing, Itemizing, & Allocating
- Slides 52-58: Mileage
- Slides 59-62: Adding an Approver
GETTING TO CONCUR

http://hss.kennesaw.edu/resources/travel/
If you are not sure if you are set up in Concur, please select the “forgot password” or “forgot user name” link. If Concur was able to send you an email with the information, you ARE set up.

If you are not set up in Concur, please email aclark92@Kennesaw.edu
TRAVEL REQUEST
HOW TO BEGIN A TRAVEL REQUEST

- Go to “+ New”, then “Start a Request”
Complete your Request Header

Request Name: “Destination, Travel Dates”

Example:

Charleston, SC 8/4-9/15

Trip Type: Domestic or International (NEVER Recruiting or Study Abroad - for HSS Travel)

Purpose of trip: Name of Conference, Workshop, Meeting, etc.

- The Speed Chart will be your default speed chart - usually your department's speed chart

- If you need to change your speed chart number, select “Code” and then type the new speed chart number
After clicking “Segments”, add your trip segments by selecting the icons.

Segments are:
- Airfare
- Rental Car
- Lodging
- Per Diem
- Miscellaneous*
- Pre-Paid
- Registration

Please make sure to research your trip before filling out a travel request.

To determine if you need to rent a car or drive your personal car, please use the cost comparison calculator: http://ssl.doas.state.ga.us/vehcostcomp/

*Miscellaneous: Mileage, Transportation, Parking, Internet, Baggage fees, etc.
COST COMPARISON CALCULATOR:

1. Choose either Hertz or Enterprise
2. Enter total mileage (roundtrip)
3. Enter the number of days you will be traveling.
4. This is if you have access to a KSU vehicle.
5. “Mid-Size” is the preferred vehicle. You may also choose “Compact”. You will need permission to choose a larger car.
6. Perform Calculations

**Hertz Capital Hill is for out-of-state**

1. Select pick up location for cost comparison purposes:
   - Hertz Capital Hill Location
   - Enterprise (In-state)
   - Hertz (In-State)

2. Enter the number of miles:
   - Business miles you plan to drive: 346
   - Miles you commute daily (round trip): 0

3. Enter the number of days (24 hour period) for which you plan to rent the vehicle: 1
4. Do you have access to a vehicle provided by your organization?**
   - Yes
   - No
5. Select up to two types of vehicles for comparison by clicking on the pictures below:
   - Compact
   - Mid-Size
   - Full Size
   - Mini-Van

**Capitol Hill Fuel Calculation.**

* Capitol Hill mileage rates with Hertz Fuel Card (Place cursor over the words "Capitol Hill" printed in blue)
** These calculations are for planning purposes only and may not represent actual costs. Calculations include anticipated fuel cost, vehicle type at the time of rental and mileage.
*** ½ Day Rental at the Capitol Hill location is at a reduced rate. All other locations ½ Day Rental is at the standard one day rate.
**** The standard mileage reimbursement rate is $0.56 per mile. If you have access to a vehicle provided by your organization but do not use it, the reimbursement rate is $0.335 per mile.

Only include commute mileage if you need to deduct your daily commute. If you are leaving from KSU enter “0”.
RESULTS:

This shows that renting a car is the most cost effective mode of transportation for this particular trip. If you would still like to drive your personal car, you will be reimbursed .23 per mile (Tier 2 rate).
Miscellaneous expenses are all of the other expenses that do not fall under the other “segments”. Please just indicate one amount for misc. and then notate what these expenses are under “comments”. 
Double check your allocations within the segments section.

If you are traveling with more than one speed chart, split your allocation here.

Make sure to add the approver of the budget to the approval flow.
You can allocate by Amount or Percentage.

To add a new Speed Chart, select “Add New Allocation”.

To change the Speed Chart, search by Department or Speed Chart number (Text or Code).

Save Allocations.
Step 6: Review your Approval Flow. If you have more than one Speed Chart number make sure that each Speed Chart’s approver is in your approval flow.

Step 7: Add Ashlee Clark to your approval flow by clicking the second “+” beside the Manager Approval line.

Step 8: Type “Clark, Ashlee” in the User-Added Approver line.

*Important* Add Ashlee Clark to your approval flow EACH time you submit.
Once you have added your approvers, click “Save Workflow”

Click “Submit Request” once you have reviewed your Travel Request and are ready to submit

- Your Travel Request should be fully approved BEFORE you begin booking your travel.

- You cannot edit a fully approved travel request. If you need to revise your request with significant changes, you will need to delete your old request and submit a new one.

- Once you return from your trip, please begin your expense report. Make sure your request has been pulled into the report.
BOOKING TRAVEL & BEGINNING YOUR REPORT
TRAVEL AGENT QUESTIONS

• If you need to book a ticket for yourself & a companion, want to book airfare with colleagues, have found a good deal outside of the system and want to see if Concur can match it (or do better), or just need information...

• Call the Travel Agent from Travel Inc. 770-291-5190
TRAVEL AGENT FEES FOR BOOKING

• Please note: You are automatically charged a travel agent fee when booking with Concur:
  • The fee to book online is $4.27
  • The fee to book over the phone is $20.33
  • If you edit your bookings (change flight time, etc.) you will be charged an additional fee

• Booking all of your expenses together (airfare, rental car, and hotel) = 1 fee

• If you book your expenses separately in Concur you will be charged multiple travel agent fees!
BOOK YOUR TRAVEL ON THE “MY CONCUR” PAGE
BOOKING HOTEL WITH CONFERENCE RATE

- Finance and Accounting has OKAYED the booking of Conference Hotels outside of Concur.

- If you are booking a hotel in the State of Georgia, please make sure to use the Hotel/Motel Tax Exempt Form (found on the HSS Travel Webpage).

- You CAN book the conference hotel in Concur if you wish:
  - On the last page before you confirm your reservation there is a section for "Travel Agent Notes."
  - Here you need to indicate the conference name, rate, and any additional information the travel agent will need to know.
  - Then confirm your hotel reservation.
  - You will receive an initial confirmation via email.
  - You will receive a second email:
    - Confirming the conference rate.
    - A direct email from the agent indicating that they couldn’t get the conference rate—
      if this is the case cancel the reservation and book directly through the hotel or conference.
HOW TO SET UP GOVERNMENT RATES WITHIN YOUR PROFILE

Go to: Profile and then Profile Settings
HOW TO SET UP GOVERNMENT RATES WITHIN YOUR PROFILE

1. Select Travel Preferences
2. Check the Government Box & Save
TRAVEL REPORT
NEW EXPENSE REPORT

• Step 1: Go to Requests, View Approved Requests. Once you’ve found your request, click “Expense”
ALTERNATIVE WAY TO BEGIN AN EXPENSE REPORT

• Step 1: Go to www.concursolutions.com and log in (the link is also on the HSS Travel Resource Page)

• Step 2: Select “Expense”, Then select “Create New Report”
When filling out your Report Header for your Travel Expense Report, click “Add” to add your fully approved Travel Request.
PER DIEM
HOW TO ADD PER DIEM

- Once you have filled out your Report Header, Click “Next”.

You will then be asked “Will this Report include meals per diem?” Click “Yes”.
• *If you did not click “Yes” to the Per Diem Question and you are already in your Expense Report, click “Details” and then “New Itinerary”*
• Type in the city you departed from, date, time, city you arrived in, date, and time. Then click “Save”. This is the first day of your itinerary.
• Now, fill out another itinerary stop and “Save”.

• You should now have your full itinerary (unless you travelled to multiple cities). If you travelled to multiple cities, please continue to fill out your itinerary.

You must have at least two lines for your itinerary. (Unless you only travelled one day).
• Click “Expenses and Adjustments” or “Next” twice
Here you will see the per diem calculated. Indicate which meals you **DO NOT** want to claim (see Breakfast, Lunch, and Dinner provided). The per diem amounts will automatically populate on the right side.
• Next, click “Create Expenses”
• Your Per Diem is now added to your Expense Report

*Make sure to include your conference at-a-glance schedule to your report as backup documentation showing whether meals were provided to you or not.
ATTACHING AN AGENDA
HOW TO ATTACH AGENDA

Go to “Receipts”, then “Attach Receipt Images”
Click “Browse” and find the scanned copy of your agenda on your desktop.
Now that your file attached, please select “Close”.

To view your receipts go to: Receipts, View Receipts in New Window.
IMPORTING, ITEMIZING, & ALLOCATING EXPENSES
HOW TO IMPORT EXPENSES

- Import **ALL** expenses related to your travel that you’ve booked within Concur:
  - Travel Agent Fee, Rental Car, Hotel, and Airfare)

- Once you are in your expense report (after you have completed the per diem section) the expenses that need to be imported will show up on the right

- If you do not see expenses to be imported, please click the “Import” button

- Check the box beside each expense that needs to be imported to your expense report

- Select the “Import” button under “Smart Expenses”
YOU HAVE SUCCESSFULLY IMPORTED YOUR EXPENSES!
HOW TO ITEMIZE HOTEL EXPENSES

• Click “New Expense” and then “Hotel”

• Fill out all of the appropriate lines for Hotel

• Attach the scanned PDF copy of your receipt

• Then click “Itemize”

* If you did not book in Concur you will get an error asking you to explain why you did not book in the system- please type the explanation in the comments box and save (Ex: Conference Hotel)
• The itemization tab will prompt you to fill in the travel dates, Room Rate, and any taxes you were charged.

• Additional Charges: Internet, Phone, Parking, Hotel Shuttle, etc. that you are claiming will also be itemized on this tab under “Additional Charges”.

• Then click “Save Itemizations”.
• If you get a red “!” there is something wrong with the expense line and needs to be adjusted in order to submit your report.

• If your hotel amount is off by a penny or if the room rate was different per night you may adjust one itemized line amount at a time to match the total of the hotel bill.
HOW TO ALLOCATE EXPENSES IN EXPENSE REPORT

• Go to “Details” and then “Allocations”
• Click “Allocate Selected Expenses”
• The allocation will pull up on the right side

You will see all of your expenses on the left side. Select the expenses you want to allocate or select all.
• Click “Add New Allocation” to add a speed chart number
• Then you may allocate by amount or percentage
• Once you have added your allocation line you may type in the appropriate budget

• You may search by Text (name of department) or Code (speed chart number)

Once you have added your allocations, Click “Save”.
LIMITING YOUR REPORT TO CERTAIN AMOUNT

- If you are only eligible to receive reimbursement for a certain amount you have two options:
  - Only include the expenses you are eligible for
  - Check the personal expense box for the expenses that you are not eligible for reimbursement
MILEAGE
If you have not added your personal car to your profile, please do so before requesting reimbursement for mileage.

Go to Profile, Profile Settings, Expense Settings, Personal Car
You DO NOT have to put your VIN # or tag #

Indicate Tier 1 as your “Preferred Car” and then click “new” to add another line for Tier 2. Then Save.

* Tier 1: .575 per mile
* Tier 2: .23 per mile
Click “New Expense” and then select “Personal Car Mileage”
Fill out all of the required boxes. Then select “Mileage Calculator.”

Leave the location lines and distance box blank - The Mileage Calculator will fill that information in automatically.
Type in the addresses of the locations you departed from and arrived to.

If you departed or arrived from home on weekdays (and did not go to work that day), please select the “Deduct Commute” box.

Click “Add Mileage to Expense”.

You may select “Make Round Trip” and will not have to add another expense line for your return trip.
After you have filled out the Mileage Calculator, your Distance and Amount is automatically filled in for you.

Indicate Tier 1 or Tier 2. You must have added this to your profile BEFORE. Select Tier 2 if driving your car is not the most cost effective mode of transportation.

Click “Save”
ADDING AN APPROVER
HOW TO ADD ASHLEE CLARK TO APPROVAL FLOW

Select “Details”, then “Approval Flow”
Click the Plus Sign beside “Manager Approval”
Type “Clark, Ashlee K”

Save Workflow
THAT WASN'T SO BAD, RIGHT?

If you have questions, feel free to contact me:
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