Table of Contents

Planning your trip.................................................................Page 3
Know before you go...............................................................Page 6
While traveling.......................................................................Page 8
After your trip.......................................................................Page 9
Planning your trip

Set up your Concur profile

Completing your profile in Concur is quick and easy and will simplify your travel and expense reporting. You can set up your travel preferences, including providing your email, contact information, and credit card information to be used for booking. You can also set up your travel assistant(s), expense report delegate(s), default approver(s), and specify a default shortcode to be used for charging expenses.

- Travel Profile Reference
- Expense Profile Reference

Activate and register for Receipt Store

When you have expenses that require a receipt, using the Receipt Store is an easy and efficient way to “file” receipts for future use. The Receipt Store is a virtual repository provided by Concur for the purpose of storing and attaching receipt images to line-item expense entries.

You will need to enter your U-M email address as one of the emails in your Concur profile before using the Receipt Store. Email receipt images to your Receipt Store by sending images to receipts@concur.com. Once the image is available in Receipt Store, you or your expense delegate can apply the images to an expense report line item.
Activate and register for E-Receipts

Concur has partnered with several airline, hotel, and car rental companies to provide electronic receipt data (E-Receipts) directly to Concur, eliminating the need for a paper receipt. When hotels provide E-Receipts, the required itemization is automatically recorded. For detailed instructions on activation, refer to the E-Receipt Quick Reference Guide.

PCard

The PCard is intended for university travel and business hosting. Faculty and staff with regular appointments are eligible to obtain a PCard, however, units generally consider frequency of travel when approving PCard applications. Data from PCard transactions is automatically imported into Concur for reconciliation.

If any of your expenses will be reimbursed by a third party, some conditions must be verified before using the PCard to pay for those expenses.

For more information, visit our PCard program information page.

Booking travel

Booking your travel in Concur provides many benefits, including university discounts, a dedicated travel agency to assist with booking or reservation changes, and a one-stop resource for all of your travel reservations. In addition, you will experience efficiencies in reporting expenses because much of what you book can be imported directly into your expense report.

For more information on booking travel, refer to the Booking Travel Reference Guide.

Download the Concur mobile application

The Concur mobile application syncs to your Concur user account and allows you to create expense reports while you travel. The mobile application offers a variety of functions such as entering expenses, capturing and uploading pictures of receipts, viewing card transactions, and checking the status of expense reports.

Receipt images captured in the Concur mobile application are available for you or your expense delegate to access in your Receipt Store. Please refer to the Quick Reference Guide for detailed instructions.
Register for TripIt Pro

Want your own personal travel assistant? Then you’ll love TripIt Pro! It’s like having your own personal assistant to keep you organized and in the know while you’re traveling. With TripIt Pro, you will receive notifications related to your trip, such as flight changes, flight delays, and gate changes.

Keep all of your travel information in one itinerary. If you must book part of your travel outside of Concur, just email those details to plans@concur.com and all of your travel reservations will be stored in one itinerary! Follow the simple steps in the Quick Reference Guide to connect your Concur and TripIt accounts and start your TripIt Pro membership. Once you’re up and running, you can continue to book travel through Concur, and your plans will automatically show up as an itinerary in TripIt.

Hotel reservations for your conference

The conference organizer may have a dedicated site for you to book a hotel room. You may choose to book using the information provided by the conference, or look in Concur to see if there is a better rate available than the conference rate. If you do book your hotel outside of Concur, remember to forward your booking to plans@concur.com if you have registered for TripIt Pro.

Car Rental

When you reserve your rental car using Concur, our preferred vendors’ university contract prices are applied. In addition, the plan number and the insurance coverage are noted, so there are no additional steps for you. If you are traveling within the U.S. or Canada, make sure you are not paying for insurance as the university is self-insured. If traveling internationally, we recommend you purchase the insurance when renting a car.
Know before you go

Meal reimbursements
Claim meal reimbursements through per diem. University policy follows the per diem rates and guidelines set by the U.S. General Services Administration for per diem (travel allowances).

Things to remember related to per diem:
- First and last days of travel receive 75 percent of the daily per diem rate. Meals marked ‘provided’ are excluded at the full value of that meal
- Meals charged to the PCard will be expensed using the personal expense type to offset your per diem reimbursement
- Meals provided, such as conference meals or hosted meals should be marked as ‘provided’ when recording your per diem
- Visit the U.S. General Services Administration website for per diem rates

Receipts
University policy requires receipts for all airfare, car rental, and lodging, regardless of cost. In addition, receipts for all other expenses (not covered by per diem) are required when the expense is $75, or greater. If you are hosting a business meal, you should obtain an itemized receipt.

Your unit may have stricter receipt requirements, so be sure to check before traveling.

Keep a hard copy of all required receipts for at least 12 months (depending on funding, you may be required to retain receipts longer).
Charges allowed on the PCard
Unless your travel expenses will be reimbursed by a third party, the PCard can be used for all university travel and business hosting-related expenses. If a third party is reimbursing for travel expenses, you may use the PCard if the following two conditions both apply:

- The reimbursement will be payable to the University of Michigan
- Your unit knows the amount to be reimbursed
If the third party is reimbursing the individual directly, those expenses cannot be paid with a PCard.

Personal travel rewards
You can add travel reward information in the profile section of Concur. As you make your reservations, your rewards information will be recorded in the itinerary.

Change in flight schedules
If you’d like to receive notification of flight changes, register for TripIt Pro. You will receive notification of flight cancelations, delays, and gate changes.

If you need to change your flight, you will incur a change fee from the airline in addition to any additional fare costs. This will require an explanation when preparing your expense report.

Mileage in lieu of airfare
At times, a personal vehicle may be used in order to save time, transport equipment, or reduce costs when several people are traveling together. Reimbursement is calculated per mile based on the current federal mileage reimbursement rate and is limited to the amount of the cost for standard round trip coach airfare.
While traveling

Manage your expense reports while you travel

You can create expense lines and attach receipts to those lines by taking a photo with your mobile device. You can also take photos of your receipts with your mobile device, which will automatically be uploaded to your Receipt Store for assignment to expense reports.

When using your PCard, you should not create expense lines until the charge is available to assign to a report in Concur. These charges typically take two to three days from the day the vendor processes the transaction until they are available in Concur.

You can monitor the status of other expense reports on your mobile device.

Change of plans

You can modify your trip from your mobile device—make additional reservations, change existing reservations, and arrange for a taxi, etc., once you reach your destination.

Travel agent assistance

If you booked your trip in Concur you can contact Conlin Travel for assistance. Call Conlin toll-free at (855) 200-8785. This is a UM-dedicated phone number. When calling from outside the United States, use (734) 477-6022. Please review the Reference Guide for more information.
After Your Trip

Creating your expense report

Create an expense report to claim your per diem, itemize your hotel charges, assign PCard charges, and add out-of-pocket expenses. A step-by-step procedure guide is available for creating expense reports.

Business purpose for your expense report

Expense report lines in Concur require a clear business purpose, which is defined as one that:

- supports or advances the goals, objectives, and mission of the university
- adequately describes the expense as a necessary, reasonable, and appropriate business expense for the university.

Review the Concur Business Purpose document for guidance in creating an expense report with an appropriate business purpose.

Itemizing your hotel expense

Hotel expenses must be itemized. If you have enabled e-receipts and the hotel is an e-receipt provider, the hotel expense will automatically be itemized. For step-by-step instructions on hotel itemizations, please refer to the Quick Reference Guide.
Submitting your expense report

Faculty and staff should submit an expense report within 45 calendar days from the last day of travel. If you have a delegate assist in creating your expense report, you are still required to attest to the expenses and submit your expense report.

Reimbursement for mileage to the airport

Origin for business travel is computed from the employee’s U-M office location. A mileage calculator is available in Concur that uses Google Maps to determine the total distance traveled.

For further assistance on Personal Car Mileage, please call (734) 764-8212, opt. 2.

PCard charges

You must wait until the PCard charges are available in Concur before you can expense the transaction. If you attempt to enter PCard transactions manually, the expense is created as an out-of-pocket expense and will result in a payment to the employee.

Depending on the vendor, charges typically take two to three days to appear in Concur. If more than 10 days have passed and the charges are still not available in Concur, contact Procurement Services at (734) 764-8212, opt. 3.

Record your Per Diem (in Concur)

If you have per diems in your report, click ‘Yes’ when the dialog box appears asking, “Are you including a request to be reimbursed for per diem expenses in this report?”

If meals were provided during your trip, be sure you check the box corresponding to the meal that was provided when you are completing the per diem itinerary. For these travel days, meals provided are deducted at the full value for that meal for that location. On travel days (first/last day of trip), your daily per diem is limited to 75 percent of the daily allowance, which is calculated automatically.

If you have questions regarding daily or meal rates, please visit the U.S. General Services Administration website. For further assistance, view the step-by-step instructions on adding per diem or call (734) 764-8212, opt 2.
If you have used your PCard for meals covered by per diem, you will need to select the expense type labeled ‘Personal’ in order to off-set your Per Diem for the meals you charged.

**Attaching receipts to your expense report**

There are two locations where you can attach receipts to your expense report:

1) Report Level
2) Individual line-item level

In addition to uploading an electronic file from your PC to your expense report, there are other options to upload your receipts. Please refer to the *Attaching Receipts Quick Reference Guide* for detailed instructions.

**Assistance**

Contact the ITS help desk at help@umich.edu or (734) 764-HELP (4357) with questions related to Concur navigation.

Travel and expense policy or process-related questions should be directed to Procurement Services at procurement.services@umich.edu or (734) 764-8212, opt 2.

- Infrequent Travelers Video
- Traveler Quick Tips
- Traveler System Quick Tips

**Note:** For a complete listing of resources, please check our *Concur User Resources Guide*. 