End User Go Live Checklist

Updated October 24, 2012

Objectives

- Explanation of benefits gained by staying within the 'travel wheel'

- Go live checklist to help you get started and establish the most effective way to use TravelWayne
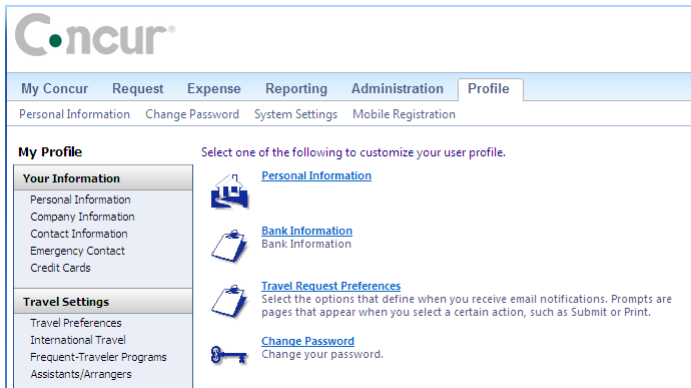
Travel Smarter with
TravelWayne powered by Concur, Conlin Travel and Chase MasterCard

Payment — Check or Direct Deposit

Travel Request

Your TravelWayne Experience

Book Trip — Concur Online Booking — Conlin Travel Agent

Expense Report

Auto-populate expense report entries

Chase MasterCard

Travel Event

Mobile Apps — Travel Wayne

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Step 1 (required):
Establish your User Profile before using TravelWayne

Notations:

- Each traveler must establish their user profile prior to booking and prior to their first expense report submission.
- Terminology: "Delegate"- An individual that creates travel requests and/or expense reports on behalf of others
- Terminology: "Travel Assistant"- An individual that books on behalf of others

Activities:

	Establish your personal information. Note, your name must match your Passport / ID to pass TSA security lines. It is recommended to spell out your middle name within your profile.
	Establish your direct deposit banking information. A penny test will be conducted between your bank and JP Morgan Chase. This penny test must be successfully completed prior to your first expense report submission.`
	Establish your travel preferences for online and agent booking purposes.
	Establish your delegate(s) and travel assistant(s) within your profile, if others will be helping you with your travel request, booking your travel, and/or creating your expense report. Note: A delegate can only create your travel request or expense report – you must SUBMIT your reports.

Step 2 (recommended):
Apply for the Travel Card (based upon BAO approval)

TravelWayne

Notations:
- JP Morgan Chase travel cards are available to travelers upon BAO approval
- An application must be filled out by the traveler; the application states the agreement between Traveler and WSU
- Travelers' credit is not checked nor impacted by travel card
- Application must be approved by the BAO, Department Chair/Director, and Dean/AVP/VP
- WSU will pay JP Morgan Chase for approved WSU travel card expenses
- Employee is responsible for payment of personal charges

Activities:

	Obtain the travel card application from the TravelWayne@Wayne.edu website.
	Obtain required signatures for your travel card application.
	Your BAO will send the signed travel card applications via inter-office mail for processing. It will take 2-3 weeks to process your travel card application.

Travel Request
Obtaining authorization prior to booking

TravelWayne

Payment | **Travel Request**

Check or Direct Deposit

Book Trip

Concur — Online Booking

Conlin Travel — Agent

Benefits:
- Electronic approval and routing
- Travel request links to your expense report(s); minimizing downstream data entry

Expense Report

Auto-populate expense report entries

Chase MasterCard

Travel Event

Mobile Apps

Travel Wayne

- Talk to your Business Affairs Officer (BAO) to understand if an additional approver needs to be added to the workflow prior to your immediate supervisor
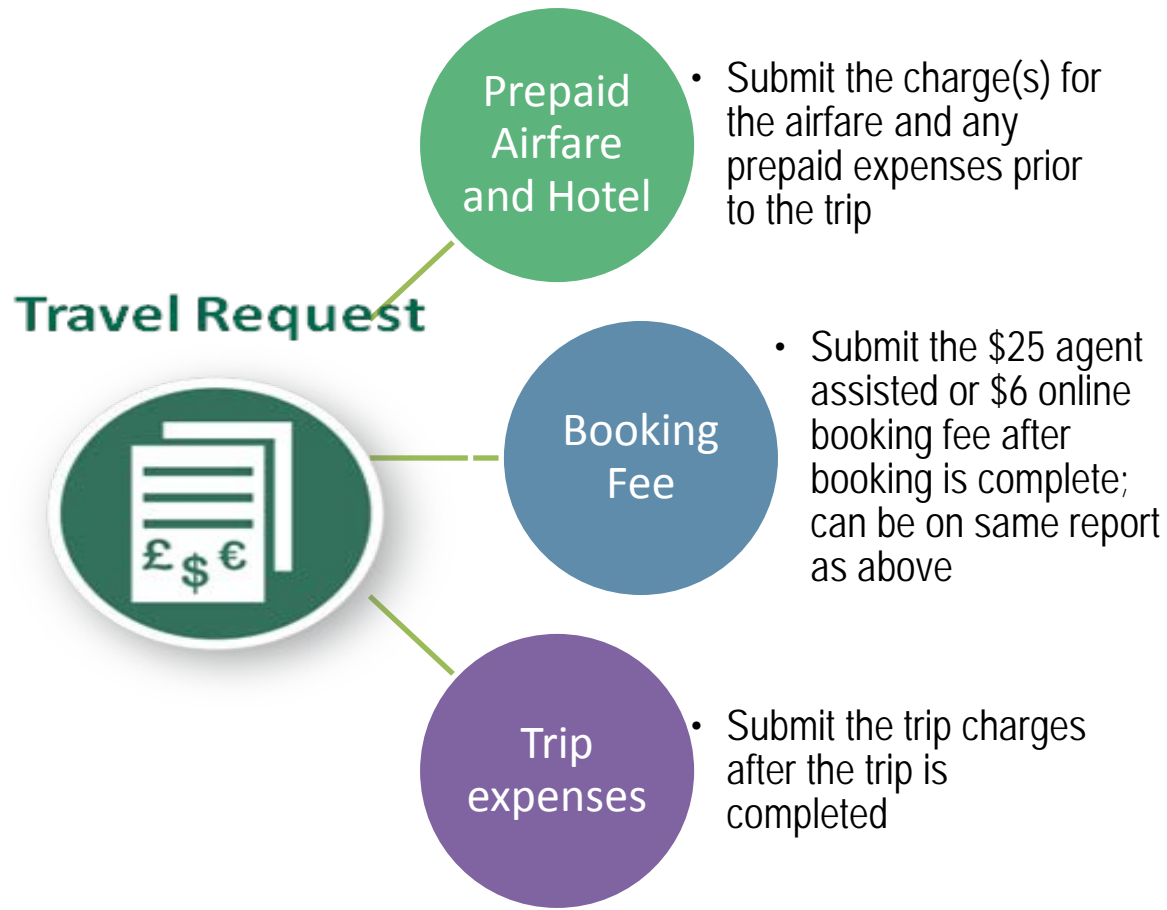 - Departments are able to tailor this additional approver as they need

Book Your Trip

Online booking tool or Conlin Travel agent

Payment — Check or Direct Deposit — PAID

Travel Request

Benefits:
- WSU-negotiated pricing for top travel suppliers
- Built-in travel policy provides exception warnings
- Note booking fees:
  - Online - $6
  - Agent-assisted - $25

Expense Report

Book Trip

Concur — Online Booking

Conlin Travel — People. Technology. Results. — Agent

Auto-populate expense report entries

Chase MasterCard — JPMorganChase

Travel Event

Mobile Apps

Travel Wayne

Many expense reports can be tied to one travel request

Travel Request

Prepaid Airfare and Hotel
- Submit the charge(s) for the airfare and any prepaid expenses prior to the trip

Booking Fee
- Submit the $25 agent assisted or $6 online booking fee after booking is complete; can be on same report as above

Trip expenses
- Submit the trip charges after the trip is completed

Your Travel Tools

Variety of mobile applications manage itineraries, notification, and receipts, plus more!

Wayne State
TravelWayne

Payment | **Travel Request**

Check or Direct Deposit
PAID

Benefits:
- Tripit Pro – itinerary, flight alerts and tracking, calendar integration, alternate flights, inner circle
- Concur mobile app – travel requests, approvals, expense reports – while on the go!
- Ability to capture receipts via smartphone camera

Expense Report

Book Trip

Concur
Online Booking

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Auto-populate expense report entries

Chase MasterCard

JPMorganChase
5147 1234 5678 9112
00700-00700

Travel Event

Mobile Apps   **Travel Wayne**

Step 4 (recommended):

TripIt Pro: Activate subscription and download onto your smart devices and / or manage via www.tripit.com

Notations:

- Go mobile with the Tripit Pro app for iPhone®, iPad®, Android™ and BlackBerry® provided by Wayne State University! Note: TripIt Pro is only available after you activate your subscription located on your home page of Travel Wayne.

Travel Alerts	
Wayne State University is giving **TripIt Pro** to all employees.	Activate Subscription
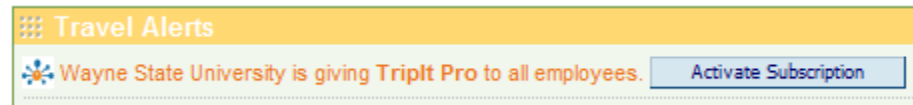
- Features of TripIt Pro:
    - Master itinerary
    - Calendar integration
    - Flight alerts
    - TripIt Groups
    - Points tracker
    - Airfare monitoring
    - Alternate flights
    - Inner Circle

Activities:

	Activate your free subscription for TripIt Pro within your TravelWayne's home page (see above).
	Download the TripIt application from the appropriate marketplace based on your smartphone.
	TripIt Pro also has a web application (www.tripit.com) for online management and viewing, for both smartphone and users that do not have a smartphone.

Step 5 (recommended):

Concur Mobile Application: Activate and download onto your smart devices

TravelWayne

Notations:

- Go mobile with the Concur Mobile app for iPhone®, iPad®, Android™ and BlackBerry® provided by Wayne State University! Note: A personal identification number (PIN) must be established within your user profile for the Concur Mobile app before downloading the application to your smartphone.
- Features of Concur Mobile app:

  - Travel request creation
  - Approving online
  - Bookings
  - Itinerary tracking

  - Upload photo of receipts
  - Expense report creation
  - Review open card charges
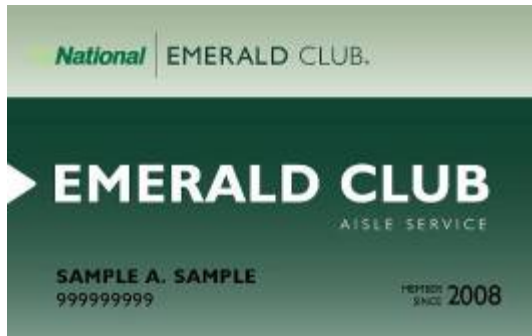 - Taxi Magic Access

Activities:

	Identify your Concur Mobile application Personal Identification Number (PIN) within your profile.
	Download the TripIt application from the appropriate marketplace based on your smartphone. Use your PIN to activate the application.

Notations:

- National's Emerald Club card provides the traveler with their car of choice.
- It as simple as …
  1. Pick your favorite car from their lot
  2. Show your drivers license on the way out
  3. You are on your way!

- Enterprise contract remains in place. Enterprise and National are part of the same holding company.

Activities:

	Sign up for an Emerald Club membership. Registration is available at https://www.nationalcar.com/offer/XZ20B21.
	Through the Concur Online Booking tool, reserve a standard/mid-size car and you can select your car of choice from the Emerald Aisle without any additional charge.
	At the airport, skip the reservations desk and go to the lot and select your vehicle from the Emerald Aisle. The upgrade is free. Show your card and license at the gate.

Step 7 (recommended):

E-Receipts and Receipt Store: These receipt capabilities move you towards paper-less receipts

A) Activate 'E-Receipts'
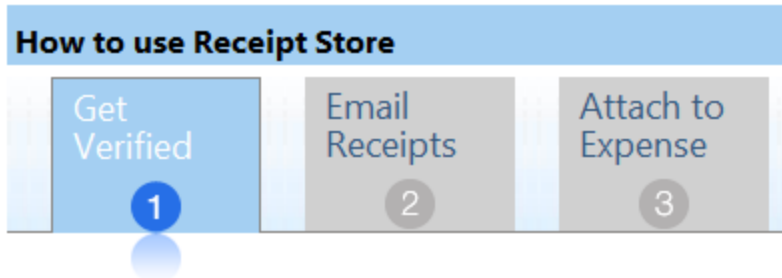
- Activate "e-Receipts" within your user profile

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

B) Activate your 'Receipt Store'

- From your home page, select **Expense tab > View Receipt Store**

How to use Receipt Store

Get Verified	Email Receipts	Attach to Expense
1	2	3

- **1: Get verified**: Enter your email and click submit. Check your email for the Concur receipt store verification code and enter in this section of the application. You will now be able to see **2: Emailed receipts** to your Receipt Store and **3: Attach the receipt to your expense report**.

E-Receipts versus Receipt Store
What is the difference between the two receipt handlers?

TravelWayne

E-Receipts

The e-receipt data is used by the Smart Expenses functionality to intelligently match possible duplicate transactions. The differences between e-receipts and Smart Expenses are listed below:
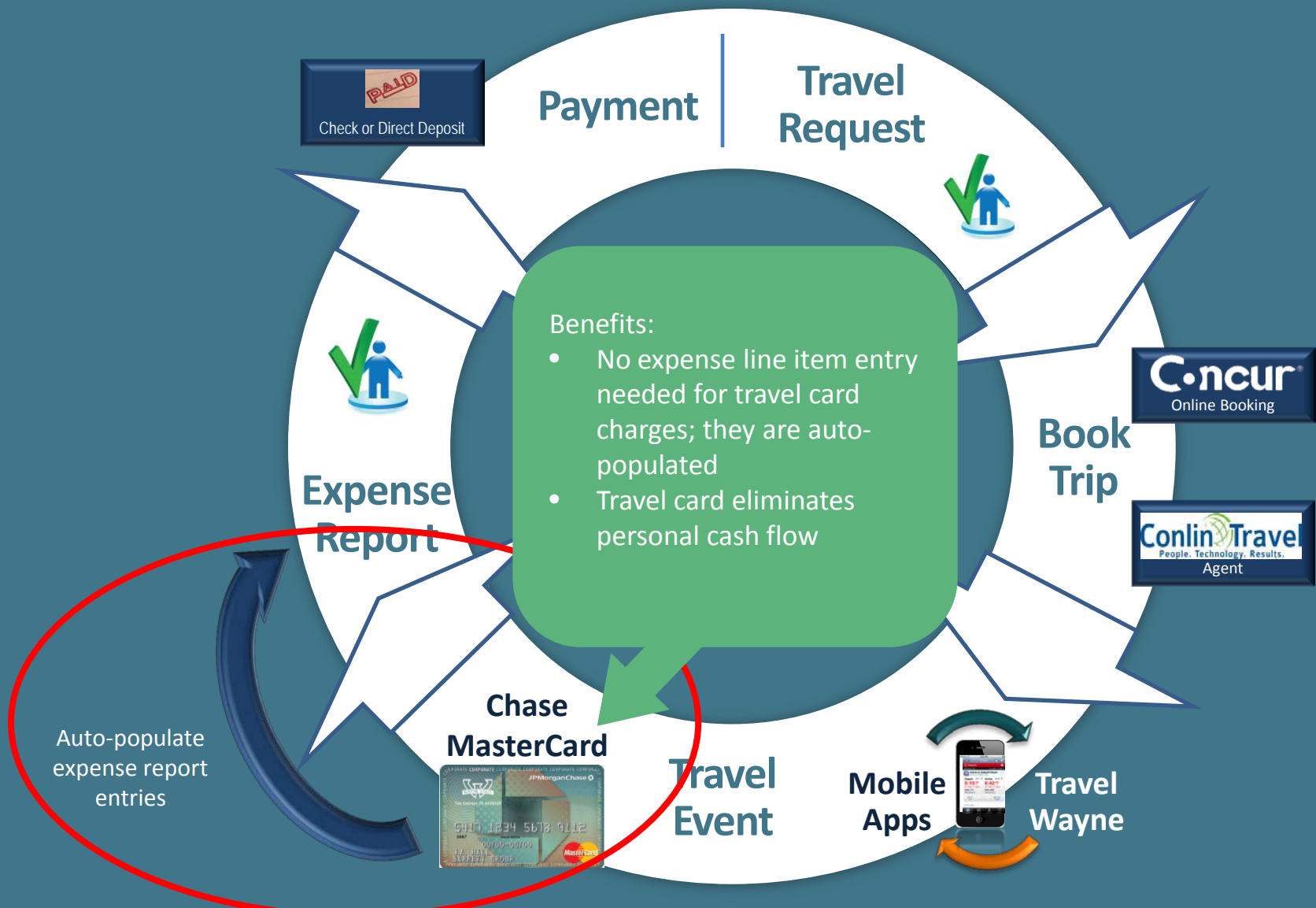
- **E-Receipt:** The term e-receipts refers to data sent to Concur through the Concur Connect Program. This data comes directly from the supplier and provides the user with a complete receipt image linked to their expense item.

- **Smart Expenses:** Smart Expenses are expenses where there is a match between two or more data points (manual entry, credit card, travel itinerary, and e-receipt). The best match is between credit card data, travel data, and e-receipt, but a match between credit card and manual entry would also qualify. If an e-receipt matches any data point, the user will be presented with the Smart Expenses screen to verify the match.

Receipt Store

- Assumes - you have not booked the vendor via Online Booking or Conlin Travel agent

- You must email your photo or scanned receipt to one of your 'verified' email addresses

- The fact that you verified your email within the receipt store, enables the receipt store to gather that receipt into the 'Receipt Store' holding area

- When creating your expense report, you simply find and link the proper receipt located in your Receipt Store to the expense report line item

WSU Travel Card
Minimizes expense line item entry by approximately **70%**

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Payment | **Travel Request**

Check or Direct Deposit

Book Trip

Concur
Online Booking

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Expense Report

Benefits:
- No expense line item entry needed for travel card charges; they are auto-populated
- Travel card eliminates personal cash flow

Auto-populate expense report entries

Chase MasterCard

Travel Event

Mobile Apps

Travel Wayne

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Travel Card Charges
Benefits of using the WSU travel card

WSU travel card charges

- Travel charges posted to the WSU travel card are automatically placed into a credit card holding area within the Concur expense solution

- Traveler (or delegate) are able to import the travel card charges into the new expense report which eliminates the basic expense line item entries

- Most transactions are fully populated; some transactions require identifying an expense category to map the charge to the proper category
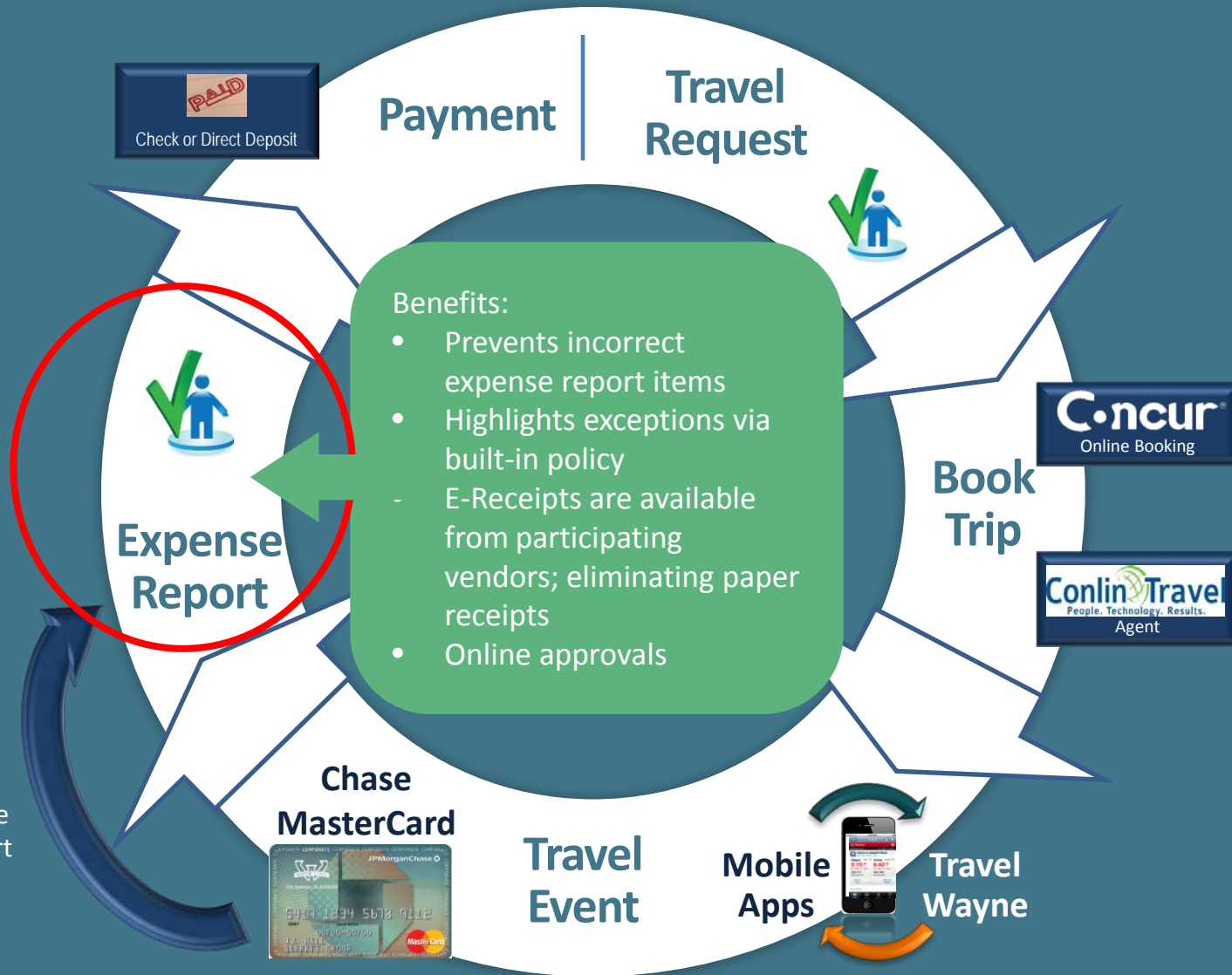
Cash flow management

- Travelers that use the WSU travel card are not required to pay JP Morgan Chase for "approved" travel charges; which eases the cash flow burden on the traveler

- Only transactions noted as "personal" are required to be paid by the traveler to JP Morgan Chase

travel smarter with

TravelWayne powered by Concur, Conlin Travel and Chase MasterCard

Payment | **Travel Request**

Check or Direct Deposit

Expense Report

Benefits:
- Prevents incorrect expense report items
- Highlights exceptions via built-in policy
- E-Receipts are available from participating vendors; eliminating paper receipts
- Online approvals

Book Trip

Concur
Online Booking

Conlin Travel
People. Technology. Results.
Agent

Auto-populate expense report entries

Chase MasterCard

JPMorganChase

5417 1234 5678 9112

Travel Event

Mobile Apps

Travel Wayne

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Payment

Travel Request

Book Trip

Travel Event

Expense Report

Check or Direct Deposit

Benefits:
- Employees with direct deposit are reimbursed 3-days after final expense report approval
- Travel card charges are paid on behalf of the employee after final expense report approval

Concur Online Booking

Conlin Travel — People. Technology. Results. Agent

Chase MasterCard

Mobile Apps

Travel Wayne

Auto-populate expense report entries

Direct Deposit
Faster and more efficient reimbursement

TravelWayne

Once an expense report is approved by your department

- If you have elected to stay with direct deposit for your payment, once an expense report is approved by all individuals within your department – payment is made within 3-5 business days

- Payment approach
  1. Approved travel card expense items – WSU pays JP Morgan Chase
  2. Out of pocket charges, such as meals per diem, etc. – WSU pays the employee via the established direct deposit
  3. Employee personal charges on the JP Morgan Chase travel card – Employee must pay JP Morgan Chase directly

Support Information

- Help Desk / Reservations: 313-577-TRIP (8747)
- Website: travel.wayne.edu
- Email: TravelWayne@wayne.edu
- Conlin Travel: conlintravelhub.com/wsu