TravelWayne 201 – Hands On Session



Last updated August 3, 2012



- TravelWayne automates the travel request, reservation booking, expense report and approval process for Wayne State employee travel – Guest, Team and group travel to be released as phase two
- This solution also introduces several improvements in the overall process:
 - New streamlined travel policy issued April 1, 2012
 - New travel agency Conlin Travel
 - New travel card JPMorgan Chase
 - Direct deposit for expense reimbursement



We reviewed these main sections

- Profile updates
- Travel Request estimated expenses
- Travel Request Approval
- Travel Booking
- Mobile Apps
- National / Emerald Club
- Expense report header & expense segments
- Expense report review & summary
- Payments Travel card and your reimbursement



Phase 1: What's now / what's next

What's now

- All employee travel
 - Including Athlete's individual travel activities
- Students that act as employees and that are not part of group travels
- Monthly mileage will be processed in TravelWayne

What's next

- In progress travels
 - Travel started with AAA and the TAER form prior to your Go Live date will be finalized with the TAER process
- Department travel cards
- Group/Team travel
- Guest & Student travel
- These expenses are being targeted for spring 2013



Travel policy & new websites

TravelWayne

🏉 Travel Policy for: Wayne State University - Windows Internet Explorer 📃 🗷								
C https://concursolutions.com/twPopup/travel_rules_popup.asp	2							
Travel Policy for: Wayne State University	~							
Close Travel Policy Group: Default Travel Class (Wayne State University)								
 Flight The Least Cost Logical Airfare is the least cost fare that is: cheapest on plane only, any carrier, fewest stops, within company default time window, using airports preferred by the user Air Fare is greater than the least cost logical airfare plus 150 dollars - Log For Reports 								
 Flight - Class of Service Cabin classes allowed: First class, Business class when Flight distance is greater than 1 M - Log For Reports Cabin classes allowed: First class, Business class when Marketing airline is in Amtrak - Log For Reports 								
Car • Car size exceeds company preferred size of Intermediate Car - Log For Reports • Car vendor is not preferred - Log For Reports								
 Hotel Rate description contains any of text 'non-refundable,nonrefundable,advance purchase,deposit' - Show, but Do Not Allow Hotel Rate is greater than the lowest rate at the hotel plus 25 dollars - Log For Reports Hotel Rate is greater than the location rate or \$200 - Log For Reports 								
When you book a trip, Conlin Travel (Wayne State University) will generate an itinerary. If any company travel policies are violated, we forward that information to the person responsible for approving your travel; otherwise the trip will be automatically approved.								
Close	-							
Done Sinternet Protected Mode: On Sinternet Protected Mode								

• The University Travel Policy is represented in the configuration of the system – please visit Travel.Wayne.edu for the most current information on the system and link to Conlin Travel Hub



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- Profile updates required
- Creating a travel request for:
 - a. Yourself or another
 - b. Cost segment estimates
- Submitting travel request for approval:
 - a. For yourself or another
 - b. Add a step before the listed approver
 - c. Notification of approval
- Booking a trip for yourself or another



Today's agenda to include (cont.)

- Creating an expense report for:
 - a. For yourself or another
 - b. Detailed expense line entry
 - c. Itemizing the Hotel Folio
 - d. Allocating Expenses
 - e. E-Receipts and attaching other receipts
 - f. Submitting for approval
 - g. Approve and forward process
 - h. Notification of approval
- Reviewing and approving expense reports

Go to user profile



Go to the online system here



- Change your time zone, date format, or language
- Update your personal information
- Set up a delegate
- Set up a travel assistant
- Set up credit cards
- Set up bank information
- (Recommended) Concur mobile apps registration
- (Recommended) E-Receipts activation



The Concur homepage

TravelWayne

C.ncur					
My Concur Request Travel Expense Profile Help	Log Out				
My Concur - Train1 Train1	atternet line.	in the	Ya	ou are administering travel for: Me	- Search
On your smartphone book your travel and manage your expenses on the go!	Approval Queue Travel Requests (0) Expense Re Report Name	employee	Report Date	Requ	Jested Amount
Image: Search Air/Rail Car Hotel Taxi Rail Flight Status Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search	iii Trip List]0			
Departure City 😭		You have no up	coming trips. See trip library for o	complete list.	
Select nearby airports	 Active Work New Expense Report View 	Reports			
Select nearby sirports	Travel Requests (7) Expense Re	ports (9)			

- The Homepage can be sorted to fit your preferences for priority viewing
- Please refer to the Homepage Job Aid for details
- Let's move to the "Profile" selection to the right on the toolbar



Your Concur profile

TravelWayne



- This is the most important section for getting starting in TravelWayne Your personalized profile must be updated for your specific information please review every screen
- You will need to advise your travelers to review it closely and update as needed or you can provide them a template for data to be entered on their behalf DON'T FORGET TO HIT SAVE

Go to Conlin Travel Profile Presentation



Go to the Conlin Screen – Profile Logon

Go to Travel Request



Go to the online system here



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Travel request header





Travel request header

ivel Request 330	CA				Cancel	Save	Attachments	▼ Print / Email ▼	Delete Travel Reque	est Submit Travel Requ
Title (Short Description)	: Attend Education	al Conference								Status: Not Sub
avel Request Header	Segments	Approval Flow Audit T	ail							
ination		Travel Type		Trip Title (Sh	ort Descripti	on)	Bi	isiness Purpose		
Vegas		Out of State Travel	*	Attend Educ	ational Confe	rence	A	ttend a conference	*	
of Doporturo		Data of Potura		Index 2			т.	in Datailed Description		
24/2012		05/27/2012		(161591) Pa	vroll		Δ	trending this educational f	forum to	
					,		p	resent the		
									~	
ent Travel Award?							A	companied By:		
	*	Guest?		Student?						
ment										
is a test transaction for cla	issroom use 🔺									

- Please begin the data entry for your travel request header page we are all going to Las Vegas
- Remember to click the save tab when complete before going to the next option - Segments



Travel request segment

Travel Request 2236		Click h	ere to a	add cost (estimat	es	
Travel Request Header	Segments	Approva	al Flow	Audit Trail			
Add Segment Click icon to create segment	•				0	9	
	Air Fare	Rail Fare	Car Rental	Lodging	Dining (Meals)	Miscell	aneous
Travel Request 33CA Trip Title (Short Description): Attend Educational Conference				Attachments - Pi	rint / Email 🔹 Del	ete Travel Request	Submit Travel Request Status: Not Submitted
Travel Request Header Segments Approval Fig	w Audit Trail						
Add Segment Click icon to create segment	Ə 🕒						

- Estimated expenses for the trip are entered to provide the approver the details of the trip
- Remember to click the save tab when complete before going to the next option -Segments



Travel request segment - airfare

ravel Request 33CA	N Contraction of the second seco	Attachments Print / Email Delete Travel Request	Submit Travel Request
rip Title (Short Description): A	Attend Educational Conference		Status: Not Submitte
Travel Request Header	Segments Approval Flow Audit Trail		
dd Segment lick icon to create segment	😔 😳 😑 🕒 🔇		
Air Ticket	Round Trip One Way Amount : USD V		Save Cancel
Dutbound	From:		
	To: Date: I Depart at V		
	Comment:	*	
		*	
-			
eturn	Date: Depart at 💌		
eturn ravel Request 33CA	Date: Depart at V	Attachments • Print / Email • Delete Travel Request	Submit Travel Request
eturn ravel Request 33CA	Date: Depart at V V	Attachments • Print / Email • Delete Travel Request	Submit Travel Request Status: Not Submitte
eturn ravel Request 33CA ip Title (Short Description): A Travel Request Header	Date: Depart at V V A Attend Educational Conference Segments Approval Flow Audit Trail	Attachments • Print / Email • Delete Travel Request	Submit Travel Request Status: Not Submitte
eturn ravel Request 33CA ip Title (Short Description): A Travel Request Header dd Segment ick icon to create segment	Date: Image: Content of the second	Attachments	Submit Travel Request Status: Not Submitte
eturn ravel Request 33CA p Title (Short Description): / fravel Request Header dd Segment ck icon to create segment Air Ticket	Date: Image: Comparison of the second se	Attachments • Print / Email • Delete Travel Request	Submit Travel Request Status: Not Submitte
eturn ravel Request 33CA p Title (Short Description): / Travel Request Header dd Segment ck icon to create segment Air Ticket Dutbound	Date: Depart at v V Attend Educational Conference Segments Approval Flow Audit Trail Image: Conference Image: Conference Image: Conference Segments Approval Flow Audit Trail Image: Conference Image: Conference Image: Conference Image: Conference Image: Conference Image: Co	Attachments • Print / Email • Delete Travel Request	Submit Travel Request Status: Not Submite
eturn avel Request 33CA p Title (Short Description): / fravel Request Header dd Segment ck icon to create segment Air Ticket Putbound	Date: Image: Compart at mark Attend Educational Conference Segments Approval Flow Audit Trail Image: Compart at mark Image: Compart at mark <tr< td=""><td>Attachments • Print / Email • Delete Travel Request</td><td>Submit Travel Request Status: Not Submitte</td></tr<>	Attachments • Print / Email • Delete Travel Request	Submit Travel Request Status: Not Submitte
Return ravel Request 33CA ip Title (Short Description): / Travel Request Header idd Segment lick icon to create segment Air Ticket Dutbound	Date: Image: Constraint of the second se	Attachments Print / Email Delete Travel Request ch and select a location from the list.)	Submit Travel Request Status: Not Submitte

 Please be sure to review the selections available – begin typing the locations or 3 – digit short name for the airport if known



Travel request segment - hotel

Travel Request 33CA		Attachments - Print / Email - Delete Travel Request	Submit Travel Request
Trip Title (Short Description): Atter	nd Educational Conference		Status: Not Submitted Amount: \$425.00
Add Segment Click icon to create segment			Save Cancel
Check-In	City: Las Vegas, Nevada Date: 05/24/2012 At:		
Check-Out	Date: 05/27/2012 3 At:		

- As with other segments, provide the level of data required for your travel approver to know enough details of the trip to access for approval
- Departments may require more than just the expense segment amount
- Don't forget to hit "save" as you move to the next segment



Travel request segment - meal

Travel Request 33C	Attend Educational Conference	Attachments Print / Email Delete Travel Request	Submit Travel Request Status: Not Submitted Amount: \$1,025.00
Travel Request Header Add Segment Click icon to create segment	Segments Approval Flow Audit Trail Image: Constraint of the segment of		
Dining	Amount : 200.00 USD 💌		Save Cancel
Start	Date: 05/24/2012 At: Detail:		
End	Date: 05/27/2012 🖸 At: 🗸		
	Comment:	A	E

- Your meal estimate should follow the policy guidelines (See GSA Tables for per diems)
- Departments may require more details in the comments section if a meal will be a group event or business meal
- Don't forget to hit "save" as you move to the next segment



Travel request segment - summary

PDF

E-Mail

Print

Close

Booking Business Travel	
Request ID : 22CA	
Minimum construct basis (05/24/2012)	
Approval Status : Not Submitted	
]
List of Travel Request Exceptions	
Message	
You indicated you are attending a conference; return to the request header and attach the conference invitation.	
You indicated you are attending a conference; return to the request header and attach the conference invitation.	
You indicated you are attending a conference; return to the request header and attach the conference invitation.	
You indicated you are attending a conference; return to the request header and attach the conference invitation.	
Employee Name : Train1, Train1	
Email Address : <u>travelwayne@wayne.edu</u>	
Default Manager Name : Train0, Train0	
Default Manager Email : <u>travelwavne@wavne.edu</u>	
Country : UNITED STATES	
Org Unit 2-Dept ID : Accounting	
Sender Name : Train1, Train1	
Email Address : <u>travelwavne@wavne.edu</u>	
Default Manager Name : Train0, Train0	
Default Manager Email : <u>travelwavne@wavne.edu</u>	
Country : UNITED STATES	

• Using the Print/Email Tab – generate a summary for your review online



Travel request segment - summary

		Segments							
Air Ticket									
Foreign Amount : \$425.00									
05/24/2012 Detroit Wayne County Arpt (US) – McCarran Intl (US)									
05/27/2012 McCarran Intl (US) – Detroit Wayne County Arpt (US)	05/27/2012 McCarran Intil (US) - Detroit Wayne County Arpt (US)								
Allocations : 100.00% (\$200.00) Payroll-Accounting									
Dining									
Foreign Amount : \$200.00									
05/24/2012 05/27/2012									
Allocations : 100.00% (\$800.00) Payroll-Accounting									
Hotel Reservation									
Foreign Amount : \$800.00									
05/24/2012 Las Vegas (US) 05/27/2012									
Allocations : 100.00% (\$425.00) Payroll-Accounting									
AirTirket									
Eornian Amount : \$425.00									
05/27/2012 McCarete Tell (US) - Dobolt Weinte County Arth (US)									
03/27/2012 Piccanan the (03) - Deboic wayne county Alpt (03)									
05/24/2012 Detroit Wayne County Arpt (US) – McCarran Inti (US)									
Allocations : 100.00% (\$425.00) Payroll-Accounting									
rouse (Przuce) rayter roosanting									
		_							
		Expenses							
Transaction Date	Expense Type	Business purpose	Foreign Amount	Amount					
05/24/2012	Airfare		\$425.00	\$425.00					
05/24/2012	Ladaina		\$600.00	\$600.00					
05/24/2012	Fixed Meels		\$200.00	\$200.00					
		Printed on 05/21/2012 6:11 PM							

• Using the Print/Email Tab – generate a summary for your review online before submission



Travel Request – Submission

Travel Request	t 33CA iption): Attend Educationa	I Conference			Attachments -	Print / Email 👻	Cancel Travel Request Status: Submitted & Pendin Amount:	Recall Ig Approval \$1,225.00
Travel Request Hea	der Segments	Approval Flow	Audit Trail					
Travel Request L	evel							
Date/Time	Updated By	Action	1	Description				
05/21/2012 6:18 PM	Train1,Train1	Approv	val Status Change	Status changed from Not Submitted to Submitted Comment:				
05/21/2012 6:18 PM	Train1,Train1	Approv	val Status Change	Status changed from Submitted to Submitted & Pend Comment:	ling Approval			
Entry Level								
Date/Time	Updated By	Action		Description				
Segment Level								
Date/Time	Updated By	Action		Description				
05/21/2012 6:18 PM	Train1,Train1	Except	ion	You indicated you are attending a conference; return	to the request head	er and attach the co	onference invitation.	
05/31/3013 C-10 DM	Towing Towing	Europe		Very indicated on the attending of the second second second		an and adde als dis a sec	and a second	-

• Review the Travel Request Status screen for possible Exceptions (need to attach Conference agenda)



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Go to Conlin Travel Booking Presentation



Go to the Conlin Screen – Booking Logon



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Create an expense report from the approved travel request in Concur

C•ncur [*]								
My Concur Request Travel Expense Profile Help	Log Out							
My Concur - Train21 Train21	at the second	liller.			You are	e administer	ing travel for: Me	Search
On your smartphone book your travel and manage your	Active V New Trave Travel Requ	Vork el Request 🔋 View Travel ests (2) Expense Reports	Requests					
expenses on the go!		Travel Request Name	Travel Request ID	Status	Travel Request Date	es	Total Expe	nse Report?
Trip Search		Las Vegas	<u>224H</u>	Approved	07/18/2012 07/21/2012		USD 600.00	2
Air/Rail Car Hotel Taxi Rail Flight Status	0	Conference	<u>225U</u>	Approved	04/06/2012 04/19/2012		USD 1,875.00	> 🔊
Round Trip O One Way Multi-Segment							Create an expense	report from this travel reques
Departure City 💱	Availat	ole Company Card Cha	arges					View All Charges
여	Card Na	ame	Card Number	Card St	atus		Total U	nexpensed
Arrival City 🞲	E TEST Co	rp Card	[***0047]	Active				USD 633.14
	Select Expe	nse Report New Expense R	teport 👻 Import					
Select nearby airports		Charge			Expense	Transaction	<u>Date</u>	Amount
depart v 9:00am v ±3 v		PRO SPORTS CLUB, BELLE	VUE, WA		Undefined	05/14/2011		USD 8.70
Return 🞲		BEAR CREEK GC 431, WOO	DINVILLE, WA		Undefined	05/11/2011		USD 300.00
depart ▼ 5:00pm ▼ ±3 ▼		SHERATON SUITES, ALEXA	NDRIA, VA		Hotel	05/08/2011		USD 209.85
Pick-up/Drop-off car at airport		DORAL WAY MIA, MIAMI, F	L		Undefined	05/08/2011		USD 19.59
Find a Hotel		BLUE DOOR AT DELANO, N	IAMI BEACH, FL		Undefined	05/07/2011		USD 95.00

• Choosing the correct line item, launch to the expense report using the Expense Report Icon as shown above



Expense report - header information from the approved travel request

C.ncur							
My Concur Request Travel Expe	ense Profile Help Log Out						
View Charges View Reports New E	xpense Report View Receipt Store	Approve Reports	W.CO.				¥255
Expense Center - Trai	n21 Train21	HILLER.	1111		and and the	lite.	
Create a New Expense Re	eport						
Report Header	50 -						
Destination Washington DC	Travel Type Out of State Travel	Trip Title (Short Description) Conference	Business Purpose Regional Engagement	¥			
Date of Departure 04/06/2012	Date of Return 04/19/2012	3					
Index (147291) Academic College Enrichment S	Trip Detailed Description	Student Travel Reward?	Guest?	Student?		Accompanied By:	
Report Date 05/23/2012	Travel Request ID	Comment	Dept ID Anatomy	Address 5700 AAB	*	City Detroit	
State/Province	Country US	Zip/Postal Code 48202					
Travel Requests							
							Add Remove
Request Name	Request ID	Cancelled		Request Tot	al	Amount Approved	Amount Remaining
Conference	225U	No		\$1,87	75.00	\$1,875.00	\$1,875.00
(m				1
- Me							Next >> Cancel

• Complete the header screen by entering the TR # and the and any other required items - Next



Expense report - header completed

Expense Center - Traiı	n21 Train21	ALL DE	litte		all in		134 A	111111	lie.	ality and a second s
Create a New Expense Re	port									
Report Header										
Destination Washington DC	Travel Type Out of State Travel	¥	Trip Title (Short Descript Conference	ion)	Business Purpose Regional Engagement	¥				
Date of Departure 04/06/2012	Date of Return 04/19/2012									
Index (147291) Academic College Enrichment S	Trip Detailed Description Presentation of the research findings WSU	h 🍝	Student Travel Reward? No	*	Guest?		Student?		Accompanied By:	
Report Date 05/24/2012	Travel Request ID 225U		Comment	A T	Dept ID Anatomy		Address 5700 AAB	4 T	City Detroit	
State/Province MI	Country US		Zip/Postal Code 48202							
Travel Requests										
										Add Remove
Request Name	Request ID			Cancelled			Request Total		Amount Approved	Amount Remaining
Conference	225U			No			\$1,875.00)	\$1,875.00	\$1,875.00
(

• Complete the header screen by entering the TR # and the and any other required items - Next



Meal itinerary needed for per diem calculation

Travel Allowances For Re	eport: Conference		
1 Create New Itinerary 2 Avail	able Itineraries 3 Expenses &	Adjustments	
Itinerary Info Itinerary Name Conference			
Add Stop Delete Rows In	mport Itinerary		New Itinerary Stop
□ Departure City →	Arrival City	Arrival Rate Location	Depart from (city) Detroit, Michigan Date 04/06/2012 Time 3:00 PM Arrive in (city) Washington, District of Columbia Date 04/06/2012 Time 5:00 PM
			Go to Single Day Itineraries Next >> Cancel

- Complete the required information for date of departure and click "Save"
- Complete the required information for date of return and click "Next"



Meal itinerary needed for per diem calculation

Travel	Allowances For Repor	t: Conference			
Edit Iti	nerary Available Itineraries	Expenses & Adjustments Reim	bursable Allowances Summary		
Itinera Itinerar	ar y Info y Name				
Confere Add St	top Delete Rows Import	Itinerary		Edit Itinerary Stop	
	Departure City A Detroit, Michigan 04/06/2012 3:00 PM Washington, District of Columbia 04/19/2012 1:00 PM	Arrival City Washington, District of Columbia 04/06/2012 5:00 PM Detroit, Michigan 04/19/2012 3:00 PM	Arrival Rate Location DISTRICT OF COLUMBIA, US-DC, U WAYNE COUNTY, US-MI, US	US Depart from (city) Detroit, Michigan US Date 04/06/2012 Time 3:00 PM Arrive in (city) Washington, District of Columbia Date 04/06/2012 Time 5:00 PM	E
					Save

 Complete the required fields to generate the per diem meal expense reimbursements



Meal itinerary needed for per diem calculation

Travel	Allowances For Repor	t: Conference			
Edit Iti	inerary Available Itineraries	Expenses & Adjustments Reim	bursable Allowances Summary		
Itinera	ary Info				
Itinerar Confere	y Name ance				
Add St	top Delete Rows Import	Itinerary		Edit Itinerary Stop	
	Departure City 🛎	Arrival City	Arrival Rate Location	Depart from (city) Washington, District of Columbia	<u>^</u>
	Detroit, Michigan 04/06/2012 3:00 PM	Washington, District of Columbia 04/06/2012 5:00 PM	DISTRICT OF COLUMBIA, US-DC, US	Date	
	Washington, District of Columbia 04/19/2012 1:00 PM	Detroit, Michigan 04/19/2012 3:00 PM	WAYNE COUNTY, US-MI, US	04/19/2012	
				1:00 PM	=
				Arrive in (city) Detroit, Michigan	
				Date 04/19/2012	
				Time 3:00 PM	
				·	Save

• Complete the required fields to generate the per diem meal expense reimbursements - Save



Meals to be excluded from per diem calculation

Create New Itinerary	Available Itineraries Expense	es & Adjustments Reir	nbursable Allowances Summary		
show dates from	To To	Go			
Exclude	Date/Location A	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
	04/06/2012 Washington, District of Columbia	V			\$41.00
	04/07/2012 Washington, District of Columbia				\$71.00
	04/08/2012 Washington, District of Columbia				\$71.00
	04/09/2012 Washington, District of Columbia		(m)		\$71.00
	04/10/2012 Washington, District of Columbia		[m]		\$71.00
	04/11/2012 Washington, District of Columbia				\$71.00
	04/12/2012 Washington, District of Columbia				\$71.00
	04/13/2012 Washington, District of Columbia				\$71.00
	04/14/2012 Washington, District of Columbia				\$71.00
	04/15/2012 Washington, District of Columbia				\$71.00

• Complete the required information and click "Done"



Expense report – meal line items created from the meal itinerary

() N	lew Expense	Import Details • Receipts •	Print / Email 🔹			
Expe	enses		Delete Cop	View • «	New Expense	
	Date -	Expense	Amount	Requested		
Addin	g New Expense				Expense	
	04/19/2012	Fixed Meals Washington District of Columbia	\$35.00	\$35.00	To create a new expense, click of the page.	the appropriate expense type b
	04/18/2012	Fixed Meals Washington District of Columbia	\$71.00	\$71.00	Lodging	Other
	04/17/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Hotel Meals and Entertainment	Booking Fees Conference Registration Fee
	04/16/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Breakfast Rusiness Meal (attendees)	Duplicating
	04/15/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Dinner	Internet Fees
	04/14/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Entertainment	Laundry
	04/13/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	_Transportation	Meeting Room Fees
	04/12/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Tolls Train	
•	04/11/2012	Fixed Meals Washington District of Columbia	\$71.00	\$71.00 -		
			TOTAL AMOUNT \$928.00	TOTAL REQUESTED \$928.00		



Expense report – import card charges

Conference

() N	lew Expense	Import Details •	Receipts • F	rint / Email 🔹		
Expe	enses		Delete Cop	View • «	Smart Expenses	
	Date -	Expense	Amount	Requested	Import Match Unmatch	
Addin	g New Expense				Expense Detail Expense Date	e
	04/19/2012	Fixed Meals Washington, District o	\$35.00	\$35.00	Corporate Card Charges	
	04/18/2012	Fixed Meals	\$71.00	\$71.00	PRO SPORTS CLUB BELLEVUE,WA Undefined 05/1	14/2011
		Fixed Meals			BEAR CREEK GC 431 WOODINVILLE Undefined 05/1	11/2011
	04/17/2012	Washington, District o	\$71.00	\$71.00 E	Sheraton ALEXANDRIA, VA Hotel 05/0	08/2011
	04/16/2012	Fixed Meals Washington, District o	\$71.00	\$71.00	DORAL WAY MIA MIAMILFL Undefined 05/0	08/2011
	04/15/2012	Fixed Meals Washington, District o	\$71.00	\$71.00	BLUE DOOR AT DELANO MIAMI BE Undefined 05/0	07/2011
	04/14/2012	Fixed Meals Washington, District o	\$71.00	\$71.00		
	04/13/2012	Fixed Meals Washington, District o	\$71.00	\$71.00		
	04/12/2012	Fixed Meals Washington, District o	\$71.00	\$71.00		
	04/11/2012	Fixed Meals Washington District o	\$71.00	\$71.00 -		
•				•		
		total \$9	AMOUNT 1 28.00	OTAL REQUESTED		



Expense report – import card charges

C	-nc	ur-								NAME AND A
My Co	oncur Reque	st Travel Expense	Profile Help I	.og Out						
View	Charges View	Reports New Expense F	Report View Recei	ipt Store Approve	e Reports		1992		_	
Exp	ense Ce	nter - Train21	Train21	a shirili	lte:	20	<u> </u>	and the second second	ar	
Cor	ference								Delete Report	Submit Report
() ()	lew Expense	Import Details •	Receipts • Pr	rint / Email 🔹						
Exp	enses		Delete Cop	View • «	Smart Expenses					
	Date -	Expense	Amount	Requested	Import • Match	Unmatch				
Addir	ng New Expense					Expense Detail	Expense	Date		Amount
	04/19/2012	Fixed Meals Washington, District c	\$35.00	\$35.00	Corporate Card Charges					
	04/18/2012	Fixed Meals	\$71.00	\$71.00	0	PRO SPORTS CLUB BELLEVUE, WA	Undefined	05/14/2011		\$8.70
		Fixed Meals	2250303		• •	BEAR CREEK GC 431 WOODINVILLE.	Undefined	05/11/2011		\$300.00
	04/17/2012	Washington, District c	\$71.00	\$71.00 E	☑ ⊖	Sheraton ALEXANDRIA, VA	Hotel	05/08/2011		\$209.85
	04/16/2012	Fixed Meals Washington, District o	\$71.00	\$71.00		DORAL WAY MIA MIAMLEL	Undefined	05/08/2011		\$19.59
	04/15/2012	Fixed Meals Washington, District d	\$71.00	\$71.00	0	BLUE DOOR AT DELANO MIAMI BE.	Undefined	05/07/2011		\$95.00
	04/14/2012	Fixed Meals Washington, District d	\$71.00	\$71.00						
	04/13/2012	Fixed Meals Washington, District d	\$71.00	\$71.00						
	04/12/2012	Fixed Meals Washington, District c	\$71.00	\$71.00						
•	04/11/2012	Fixed Meals Washington District a	\$71.00	\$71.00 -						
		total \$9	AMOUNT T	OTAL REQUESTED						

• Select the credit card charges to be added to this expense report and click on the "import" tab



Imported card charge - Hotel

Expe	enses		Delete	Copy View 🔹 «
	Date -	Expense	Amount	Requested
Addin	g New Expense			
·	04/10/2012	Washington, District of Columbia	\$/1.00	\$/1.00
	04/09/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
	04/08/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
	04/06/2012	Fixed Meals Washington, District of Columbia	\$41.00	\$41.00
	05/08/2011	Hotel SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85
•		III		•
			TOTAL AMOUNT \$1,137.85	TOTAL REQUESTED \$1,137.85



Expense report - meals

•	New Expense	Import	Details +	Receipts +	Print / Em	ail 🔸	
Exp	enses				Delete	Copy	View -
	Date -	Expense			Amount		Requested
Addi	ng New Expense						
	06/04/2012	Fixed M Milwauk	Fixed Meals Milwaukee, Wisconsin			00	\$61.0
	06/03/2012	Fixed M Milwauk	Fixed Meals Milwaukee, Wisconsin			00	\$61.0
	06/02/2012	Fixed M Milwauk	eals .ee, Wisconsin		\$61.0	\$61.0	
	06/01/2012	Fixed M Milwauk	eals :ee, Wisconsin		\$61.0	00	\$61.00
	05/14/2011	Miscella BURGER	neous KING N3 PHX, P	hoenix, Arizc	\$7.3	22	\$0.0
	05/08/2011	Miscella SPAZZO	neous ITALIAN GRILL 2	11, Redmonc	\$49.3	39	\$0.0

Mark the actual meal receipt as a 'personal expense' when declaring fixed meals (per diem). The traveler will need to pay JPMorgan Chase for these personal expenses – which should be offset by the per diem payment to the traveler from WSU.

39



Imported card charge details

C•nc	CUL .						EVALUA STATE
My Concur Re	quest Travel Expense Profile Help Log Out						
View Charges	View Reports New Expense Report View Receipt Store Approve Reports		······································		and the second second		
Expense	center - Train21 Train21	35			initillite.		
Conference	e					Delete Report	Submit Report
New Expense	e Import Details • Receipts • Print / Email •						I Hide Exceptions
Exceptions							
Expense	Date Amount Exception						
Hotel	Sheraton (TEST Coro Card - 0047)	created					
Hotel							(=)
_	AMERICAN SOLTA SAINT ASAPH ST	Alex Freezeway					
Expenses	EXCRESS ALEAANDRIA, VA	New Expense					Receipt Store
Date -	American Express Sunday 05/08/2011	Expense			Ø		
Adding New Expe	n CREDIT CARD#: xxxxx0047	To create a new expense, click	the appropriate expense type be	elow or type the expense ty	pe in the field above. To edit an existi	ing expense, click the exp	ense on the left side
	Transaction Amount \$209.85	of the page.					
04/09/20	1 SHERATON HOTELS SHER ALEXANDRIA	Lodging	Other	_Other	_Team Expenses	_Transportation	Â
04/08/20	1	Hotel	Booking Fees	Miscellaneous	Practice Fees	Car Rental	
	Guest Name: Number of Nights: Folio Number: Guest Name 0 8762530770	Meals and Entertainment	Conference Registration Fee	Postage	Team Meals	Gasoline	
04/07/20	1 0000000000000000000000000000000000000	Breakfast	Duplicating	Supplies (Office)	Team Supplies & Equipment	Parking	=
04/06/20	1	Business Meal (attendees)	Individual Membership Fees	Telephone Expense	Transportation	Personal Car Mileage	
05/08/20	↓ III +	Dinner	Internet Fees	Travel Visa	Airfare	Shuttle Bus/Metro Car	
	SHERATON SUITES, Alexandria, Virginia \$209.85	Entertainment	Laundry	Team Expenses	Airline Fees (Baggage etc)	Subway	
•	Imported from Credit Card	Lunch	Meeting Room Fees	Equipment Repair	Bus	Taxi	
l	TOTAL AMOUNT TOTAL REQUESTED	_Transportation					-
	\$1,137.85 \$1,137.85						

• Move the pointer to the expense line icons to reveal the attached card receipt data



Itemize the hotel expenses

Expen Hotel	se Da	ate Amount Excep /08/2011 \$209.85 🔒 it	ption ternizations are required for this entry.			
Ехре	nses		Delete Co	py View 🔹 帐	Expense Nightly Lodging Expenses	Receipt Store
	Date -	Expense Washington, District of Columb	Amount art.uv	Requested	Check-in Date Check-out Date Number of Nights Image: Obj/08/2011 Image: Obj/08/2011	^
	04/10/2012	Fixed Meals Washington, District of Columb	ia \$71.00	\$71.00	Recurring Charges (each night) Room Rate Room Tax	
	04/09/2012	Fixed Meals Washington, District of Columb	ia \$71.00	\$71.00		=
	04/08/2012	Fixed Meals Washington, District of Columb	ia \$71.00	\$71.00	Other Room Tax 1 Other Room Tax 2	
	04/07/2012	Fixed Meals Washington, District of Columb	ia \$71.00	\$71.00		
	04/06/2012	Fixed Meals Washington, District of Columb	ia \$41.00	\$41.00	Room rate and taxes will be shown as separate expenses	
 ✓ 	05/08/2011	Hotel	\$209.85	\$209.85 F	Additional Charges (each night) Expense Amount Choose an expense type	.
			TOTAL AMOUNT \$1,137.85	TOTAL REQUESTED \$1,137.85		Save Itemizations Cancel

• Enter the hotel folio details by day



Itemize the hotel expenses

Expe	enses		Delete Copy	View • «	Expense Nightly Lodging Expenses	5		Rece	eipt Store
	Date -	Expense	Amount	Requested	Check-in Date 04/06/2012	Check-out Date 04/07/2012	Number of Nights 1		Â
	04/09/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Recurring Charges (each night) Room Rate	Room Tax			
	04/08/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	200.00	9.85			E
	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Other Room Tax 1	Other Room Tax 2			
	04/06/2012	Fixed Meals Washington, District of Columbia	\$41.00	\$41.00					
V	05/08/2011	Hotel SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85	Room rate and taxes will be shown Additional Charges (each night)	n as separate expenses			
•	Itemizations	: are required for this entry III		•	Expense Choose an expense type	Amount			
		тс \$	DTALAMOUNT TO 1,137.85	DTAL REQUESTED				Save Itemizations	Cancel

• Enter the hotel folio details by day - "save itemizations"



Hotel expenses --receipt required

С	•ncı	ll.								
My Co	ncur Reques	t Travel Expense Profile H	elp Log Out							
View 0	harges View	Reports New Expense Report Vie	w Receipt Store Appro	ove Reports		· · · · · · · · · · · · · · · · · · ·				
Exp	ense Cer	nter - Train21 Train2	1	lise.			at the second	iiiiiiiiii		1997 - C.
Con	ference								Delete Report	Submit Report
() N	ew Expense	Import Details • Receipts	Print / Email							
Even			Datas C		New Expense					Receipt Store
Expe	inses		Delete	view ·						
		Expense	Amount	Kequested	Expense			P		
Addin	y New Expense	mashington, bistrict or columbia			To create a new expense, click	the appropriate expense type b	elow or type the expense type	in the field above. To edit an exist	ing expense, click the expe	ense on the left side
	04/11/2012	Fixed Meals	\$71.00	\$71.00	of the page.					
		Fixed Meals			Lodging	Other	_Other	_Team Expenses	_Transportation	
	04/10/2012	Washington, District of Columbia	\$71.00	\$71.00	Hotel	Booking Fees	Miscellaneous	Practice Fees	Car Rental	
	04/09/2012	Fixed Meals Washington District of Columbia	\$71.00	\$71.00	Meals and Entertainment	Conference Registration Fee	Postage	Team Meals	Gasoline	
	04/00/2012	Fixed Meals	674.00	674.00	Breakfast	Duplicating	Supplies (Office)	Team Supplies & Equipment	Parking	
	04/08/2012	Washington, District of Columbia	\$71.00	\$71.00	Business Meal (attendees)	Individual Membership Fees	Telephone Expense	Transportation	Personal Car Mileage	
	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Dinner	Internet Fees	Travel Visa	Airfare	Shuttle Bus/Metro Car	
	04/05/2012	Fixed Meals	641.00	641.00	Entertainment	Laundry	Team Expenses	Airline Fees (Baggage etc)	Subway	
_	04/06/2012	Washington, District of Columbia	\$41.00	\$41.00	Lunch	Meeting Room Fees	Equipment Repair	Bus	Taxi	
	05/08/2011	Hotel SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85	Transportation Tolls					
	Receipt in	mage required	\$200.00	\$200.00	Train					
	04/06/201	2 Hotel Tax	\$9.85	\$9.85 👻						
•		III		•						
			\$1,137.85	total Requested \$1,137.85						

Receipt image required icon – receipt must be attached to complete the report



Uploading a receipt image

C	•ncu	r"									-	No.
My Col	icur Request	Travel Expense Profile I										
View C	harges View Re	ports New Expense Report Vie	ew Receipt Store Approv	e Reporta								
Expe	ense Cent	ter - Train21 Train2	1									
Con	ference									Delete Report	Submit	t Report
(N	w Evnente	moort Details . Receipts	· Drint / Froail ·									
			i inter inter								Beel	1040
Expe	nses		Delete	View • « Expense	Nightly Lodging Expenses						Kec	ceipt Store
	Date -	Expense	Amount	Attach Receipt			21		G Total Amou	nt: 5209.85 Itemized: 5	205.85 Nemau	ning: solutio
	04/12/2012	Fixed Meals Washington, District of Columbia	\$71.00	Click Browse and select a .	png, .jpg, .jpeg, .pdf, .tif or .tiff file	or upload. 5 MB limit per file.	-	Business Purpose Conference				
	04/11/2012	Fixed Meals Washington, District of Columbia	\$71.00	For best results, scan images	in black & white with a resolution of 3	00 DPI or lower.		City				
	04/10/2012	Fixed Meals	\$71.00	File Selected for uploadin	ng:	Browse Attach		Alexandria, Virginia				
		Fixed Meals		Penguins,pg				Comment	14			
	04/09/2012	Washington, District of Columbia	\$71.00									
	04/08/2012	Fixed Meals Washington District of Columbia	\$71.00			Cancel						
	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	5/1.00		L.						
1	04/06/2012	Fixed Meals Washington, District of Columbia	\$41.00	\$41.00 🗮								
•	05/08/2011	Hotel SHERATON SUITES: Alexandria, Virginia	\$209.85	\$209.85								
	04/06/2012	Hotel	\$200.00	\$200.00								
	04/06/2012	Hotel Tax	\$9.85	\$9.85 +								
4		Ш										
			TOTAL AMOUNT \$1,137.85	TOTAL REQUESTED \$1,137.85					Save Add Iten	nization Attach R	eceipt C	Cancel

• Uploading the receipt image



Add a new out-of-pocket expense item

(†) N	ew Expense	Import Details • Receipts •	Print / Email *								
Ехре	enses		Delete Copy	View • «	New Expense						Receipt Store
	Date -	Expense	Amount	Requested	Expense Type		Transaction Date	Business Purpose			
Addin	g New Expense 04/19/2012	Fixed Meals Washington, District of Columbia	\$35.00	\$35.00	Vendor Name	•	From Location	To Location			
	04/18/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00	Payment Type		Amount 55.00 USD v	 Personal Expense (do not			
	04/17/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00 ≡	Cash	*		remourse)			
	04/16/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00		A T					
	04/15/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00							
	04/14/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00							
	04/13/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00							
	04/12/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00							
•	04/11/2012	Fixed Meals Washington District of Columbia	\$71.00	\$71.00 -							
			TOTAL AMOUNT TO \$1,137.85	DTAL REQUESTED				Save Itemize Al	llocate	Attach Receipt	Cancel



Submit expense report for approval

Final Review	
User Submit	
By clicking on the 'Accept & Submit' button, I certify that:	
1. This is a true and accurate accounting of expenses incurred to accomplish official business for Wayne State no expenses claimed as reimbursable which relate to personal or unallowable expenses.	University and there are
2. All required receipt images have been attached to this report.	
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.	
4. In the event of overpayment or if payment is received from another source for any portion of the expenses or responsibility for repaying Wayne State University in full for those expenses.	claimed I assume
Accept & Submi	t Cancel



Expense report summary

nis report was submitted succes pprover: Train0, Train0	ssfully.	
Expense Report		
Report Total :	\$1,192.85	
Less Personal Amount :	\$0.00	
Amount Claimed :	\$1,192.85	
Amount Rejected :	\$0.00	
Company Disbursements		
Amount Due Employee :	\$983.00	
Amount Due TEST Corp Card :	\$209.85	
Total Paid By Company :	\$1,192.85	
Employee Disbursements		
Amount Owed Company :	\$0.00	
Total Owed By Employee :	\$0.00	



Expense report submitted

C	ncur							
My Con	cur Request Travel Expense Profile Help	Log Out						
View Ch	arges View Reports New Expense Report View Re	eceipt Store Approve Reports						22.0
Expe	nse Center - Train21 Train21							
Expense I	Report List /e Reports						Delete Report	Copy Report
View	Create & Edit Import							
	Report Name	Comments	Status	Payment Status	Report Date	Total	Requ	ested Amount
	Conference Presentation of the research findings WSU		Submitted & Pending Approval - Train0, Train0	Not Paid	05/24/2012	\$1,192.85		\$1,192.85



Homepage status of transactions

C•ncur ⁻						8	
My Concur Request Travel Expense Profile Help	Log Out						
My Concur - Train21 Train21	Some line		1.00	Yo	ou are administering t	ravel for: Me	, Search
On your smartphone book your travel and manage your expenses on the go!	ITrip List K	Vou have no	upcoming trips. See trip library	for complete list.			
Image: Search Air/Rail Car Hotel Taxi Rail Flight Status	Active Hork New Expense Report Travel Requests (2) Expense Reports (1)						
Round Trip One Way Multi-Segment Departure City 😧	Report Name Conference Presentation of the research findings WSU	Status Submitted & Pendir	g Approval - Train0, Train0	Payment Status Not Paid	Report Date 05/24/2012	Requested Amou USD 1,1	int 92.85
Select nearby airports Arrival City W	Available Company Card Charges	Or of the set of	Oct Notes			View	All Charges
Select nearby airports Departure (2) depart 9:00am ± 3 3	Select Expense Report New Expense Report	Timport	Kardi Status A-et				÷
Return 🦦 depart 🗸 5:00pm 👻 ± 3 🗸 🔇	Charge Charge PRO SPORTS CLUB, BELLEVUE, 1	WA	<u>Ex</u> Un	pense Transi defined 05/14/	action Date2011		Amot A
Pick-up/Drop-off car at airport	BEAR CREEK GC 431, WOODINVI	ILLE, WA	Un	defined 05/11/	2011	US	iD 300.



Expense report – receipts

Stop the receipt runaround

email

- mobile photo
- scan and upload



Expense report - receipts

Receipts on the go smartphone photo

 Take a picture of your

 receipt on your

 smartphone via the

 Concur mobile application



Expense report - receipts

Or eliminate paper with

E-receipts:

- Save time
- Improve accuracy

eceipt				
			HOTELS & RESO	t. DRTS
Summary of Yo	ur Stay			
Hotel: DENVER	MARRIOTT CITY CENTER COLORADO, 80202	Guest: SARAH KUBERRY	<i>,</i>	
Arrival Date: (4/17/2011	Confirmation # : 885249	57 SM	
Departure Da	te 04/21/2011	Folio # : 4609198	0. 0	
Boom Bate: \$	228.00	Room Number: K9198		
nooni nato. ¢	220.00	Hoom Humber, Koroo		
Date	Description	Reference	Charges	Credits
04/17/2011	GUEST ROOM GST RM-CORP NEGOTIATED	18157889	\$228.00	
04/17/2011	ROOM TAX	18157890	\$17.10	
04/17/2011	GENERAL EXCISE TAX	18157891	\$11.40	
04/17/2011	MINIBAR	18157892	\$14.13	
04/17/2011	MOVIE RENTAL	18157893	\$9.95	
04/17/2011	VALET PARKING	18157894	\$10.00	
04/17/2011	RESTAURANT	18157895	\$48.80	
04/17/2011	TIP	18157896	\$2.00	
04/17/2011	PHONE	18157897	\$4.33	
04/18/2011	GUEST ROOM GST RM-CORP NEGOTIATED	18157898	\$228.00	
04/18/2011	ROOM TAX	18157899	\$17.10	
	OFNERAL EVOLOG TAN	19157000	\$11.40	
04/18/2011	GENERAL EXCISE TAX	1010/900	φ11.40	

Elect to receive e-receipts within your user profile



Expense report - receipts

• Concur e-receipt partners (representative list)



*ir*Tran







Marriott.

starwood Hotels and Resorts



















Training opportunities

Introduction to TravelWayne – 101

- Introduction and a review of the basics of how to use TravelWayne
- 2 hours lecture-style including a brief online demo and Q&A

Hands-on Training - 201

- Register through Pipeline by invitation only from your BAO registration is required
- Recommended for department administrators and expert users
- 2 ½ hours lab setting hands-on exercises covering Travel Request, Booking & Expense

Office hours for hands-on assistance

- Open session no agenda bring your questions
- Lab setting

On-line Training Aids

• Quick Reference Guides & Program Details located at Travel.Wayne.edu

Conlin Travel Hub

 Online booking training videos, Travel information & more located at Conlintravelhub.com/wsu



- Call **313-577-TRIP** (8747) for TravelWayne support options
- Visit **Travel.Wayne.edu** to view the travel policy and information to help you get started
- Visit www.conlintravelhub.com/wsu for a wealth of travel tips, online booking training videos and much more
- Contact your **unit's Expert User(s)** for assistance. They are ready to help you get started.

Q & A

