

# **TravelWayne Combined 101 & 201 Hands On Session for Athletics**



September 19, 2012



# What is TravelWayne?

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- TravelWayne (Concur) automates the travel request, reservation booking, expense report and approval process for Wayne State employee travel
- 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 MasterCard (Chase MasterCard)
  - Direct deposit for expense reimbursement
  - New monthly mileage form



# Today's agenda to include

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- Process overview – how does it work
- What are the roles in TravelWayne (Concur)
- What should be processed in this system
- New Travel Policy
- Functions and features of the system
- Profile updates required
- Creating a travel request for:
  - a. Yourself
  - b. Cost segment estimates
- Submitting travel request for approval:
  - a. For yourself
  - b. Add a step before the listed approver
  - c. Notification of approval



## Today's agenda to include (cont.)

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- Booking a trip for yourself
- Creating an expense report for:
  - a. For yourself
  - 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



# Concur roles

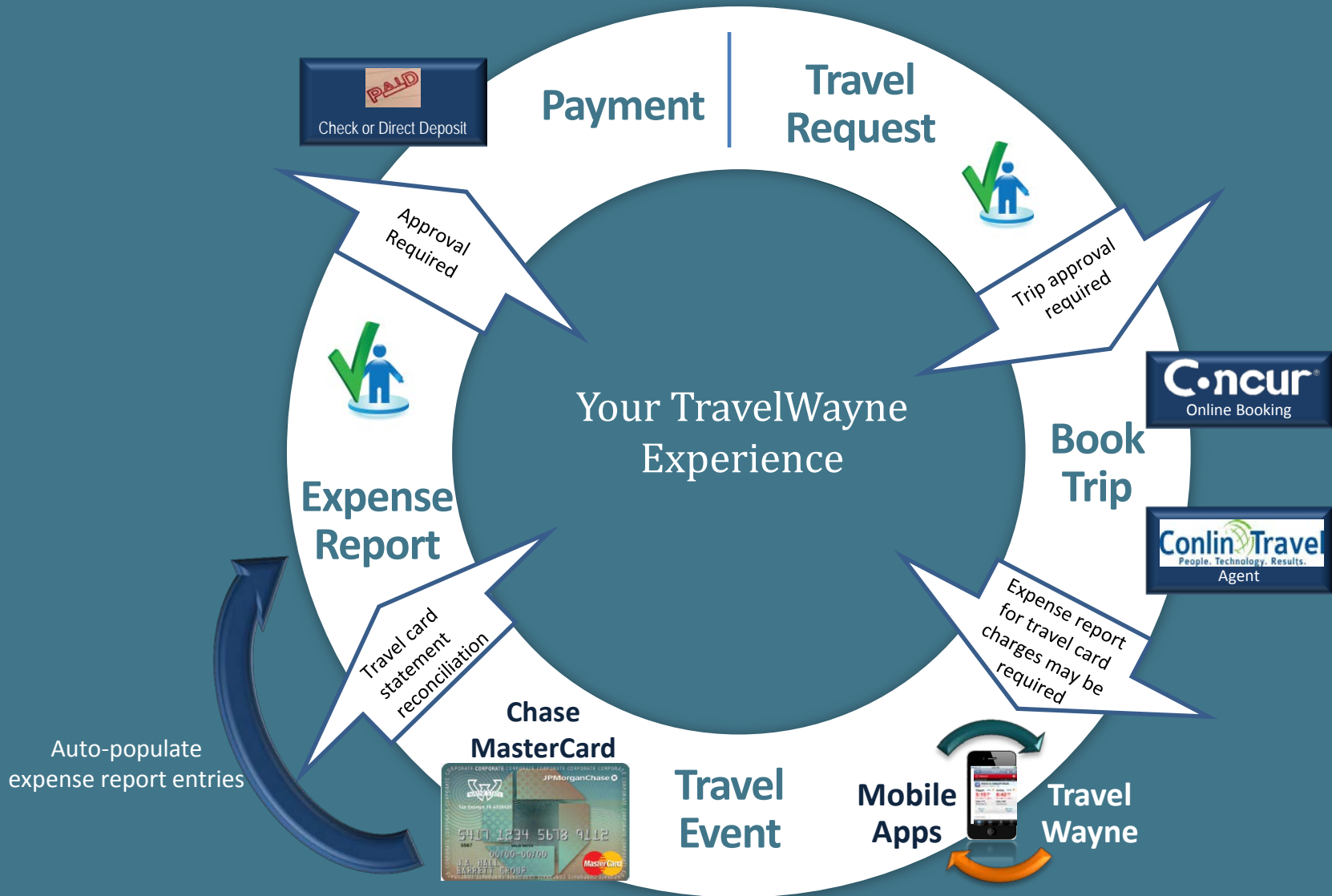
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- **Traveler**
  - All active employees with active positions
  - All employees with the exception of the following employee classes:
    - CB - COBRA Self-Pay
    - CH - Hourly Workers' Compensation
    - CO - Workers' Compensation/Salaried
    - ER - Early Retirees
    - SU - Substitute Teacher
    - TR - Public School Teacher
    - XB - Retirees
    - XD - Long Term Disability
    - XH - Housing Employer Benefits Cost
    - XO - Non Paid but Benefited
    - XU - Conversion Generated E-Class
    - XX - Terminated
- **Approvers**
  - Travel Requests should be approved by the traveler's supervisor
  - Expense Reports are approved by the BAO
- **Delegate(s)**
  - Able to create a travel request and expense report for the traveler
  - An individual can be added as a delegate with a start and end date to accommodate vacations
  - The primary delegate can be added to the user profile spreadsheet
- **Assistant**
  - Able to book a trip for the traveler
  - The assistant(s) must be entered on the user profile page and cannot be added via the user profile spreadsheet



travel smarter with

**TravelWayne** powered by Concur, Conlin Travel and Chase MasterCard





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

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## 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

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 Internet | Protected Mode: On 90%

- The University Travel Policy is represented in the configuration of the system – please visit [Travel.Wayne.edu](http://Travel.Wayne.edu) for the most current information on the system and link to Conlin Travel Hub





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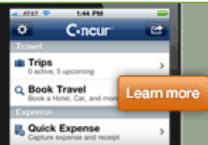


My Concur Request Travel Expense Profile Help Log Out

My Concur - Train1 Train1

You are administering travel for: **Me** Search

On your smartphone book your travel and manage your expenses on the go!



### Trip Search

**Air/Rail** Car Hotel Taxi Rail Flight Status

Round Trip  One Way  Multi-Segment

Departure City  [Select nearby airports](#)

Arrival City  [Select nearby airports](#)

Departure  depart 9:00am ± 3

Return  depart 5:00pm ± 3

Pick-up/Drop-off car at airport

Find a Hotel

Specify airline  Refundable only air fares

Class of service: Economy class

Search flights by:  Price  Schedule

Flights w/ no double connections:

**Search**

### Approval Queue

Report Name	Employee	Report Date	Requested Amount
No records found.			

### Trip List

You have no upcoming trips. See trip library for complete list.

### Active Work

[New Expense Report](#) [View Reports](#)

Report Name	Status	Payment Status	Report Date	Requested Amount
<a href="#">Test Transaction</a> Went There....	Approved	Extracted for Payment	05/12/2012	USD 815.80
<a href="#">ABCD Annual Conference</a> Attending annual conference of associaton of ABC	Approved & In Accounting Review	Not Paid	05/09/2012	USD 1,135.98
<a href="#">Meeting on Summer Session Proj</a> Planning meeting on summer session project	Not Submitted	Not Paid	05/04/2012	USD 319.00
<a href="#">Meeting on Summer Session Proj</a> Planning meeting on summer session project	Not Submitted	Not Paid	05/01/2012	USD 6.00
<a href="#">Summit 2012 Conference</a> Banner conference	Submitted & Pending Approval - Test, TApprover	Not Paid	04/23/2012	USD 2,431.76
<a href="#">ABCD Annual Conference</a> Attending annual conference of associaton of ABC	Not Submitted	Not Paid	04/05/2012	USD 532.00
<a href="#">CASE conference</a> Case conference for financial staff, including n	Not Submitted	Not Paid	04/03/2012	USD 815.84
<a href="#">ABCD Annual Conference</a> Attending annual conference of associaton of ABC	Not Submitted	Not Paid	04/03/2012	USD 0.00
<a href="#">CASE conference</a> Case conference for financial staff, including n	Not Submitted	Not Paid	03/27/2012	USD 0.00



# Concur mobile apps provide

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Concur

Triplt Pro

...broad coverage for your travel needs



# Mobile apps provide easy access to information

Manage itineraries

Full expense functionality

Directions, maps, and more

Flight status

Manage Receipts





# Triplt Pro mobile app



**Triplt  
Pro**



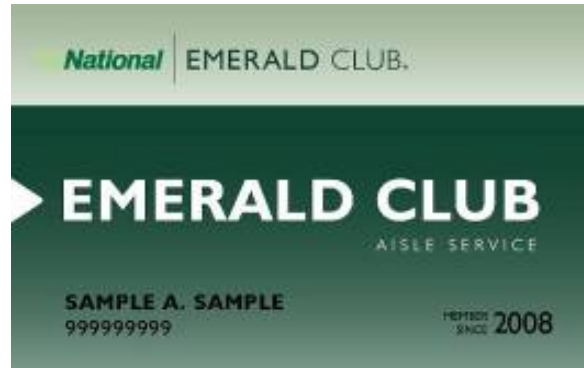
**Travel  
Wayne**

- Master itinerary
- Calendar integration
- Flight alerts
- Triplt Groups

- Points tracker
- Airfare monitoring
- Alternate flights
- Inner Circle



# Use the perks of National's Emerald Club card



Renting from National using an Emerald Club card number is as easy as:

1. Pick your favorite car from their lot
2. Show your drivers license on the way out
3. You are on your way!

WSU-negotiated prices for National and Enterprise rentals are available via the online booking tool or Conlin Travel agent



# Travel card charges auto populate!



1. Use the WSU travel card for your charges

2. Travel card charges auto populate your expense report – minimizing data entry

3. WSU pays Chase for “approved” charges – easing your personal cash flow



# Expense report – receipts

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## 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

Date	Description	Reference	Charges	Credits
04/17/2011	GUEST ROOM	18157889	\$228.00	
04/17/2011	GST RM-CORP NEGOTIATED	18157890		\$17.10
04/17/2011	ROOM TAX	18157891	\$11.40	
04/17/2011	GENERAL EXCISE TAX	18157892	\$14.13	
04/17/2011	MINIBAR	18157893	\$9.95	
04/17/2011	MOVIE RENTAL	18157894	\$10.00	
04/17/2011	VALET PARKING	18157895	\$48.80	
04/17/2011	RESTAURANT	18157896	\$2.00	
04/17/2011	TIP	18157897	\$4.33	
04/17/2011	PHONE			\$228.00
04/18/2011	GUEST ROOM	18157898		
04/18/2011	GST RM-CORP NEGOTIATED	18157899		\$17.10
04/18/2011	ROOM TAX	18157900	\$11.40	
04/18/2011	GENERAL EXCISE TAX	18157901	\$2.00	
04/18/2011	TIP			\$2.00

**Elect to receive e-receipts within your user profile**



# Expense report - receipts

- Concur e-receipt partners (representative list)



AIR CANADA



CHOICE HOTELS  
INTERNATIONAL





travel smarter with

**TravelWayne** powered by Concur, Conlin Travel and Chase MasterCard





# Travel Request - estimated expense

**Travel Request** Cancel Save Print / Email Delete Travel Request **Submit Travel Request**

Trip Title (Short Description): Status: Not Submitted

**Travel Request Header** | Segments | Approval Flow | Audit Trail

Destination **1** | Travel Type **2** | Trip Title (Short Description) **3** | Business Purpose **4**

Date of Departure **5** | Date of Return **6** | Index **7** | Trip Detailed Description **8**

Travel Award? **9** |  Guest? **10** |  Student? | Accompanied By: **11**

Comment **12**

Note: the RED bar in a field indicates it is *required*

**Travel Type**

- Out of State Travel
- ATHLETIC Team Travel
- Foreign Travel
- In State
- Out of State Travel

**Business Purpose**

- Attend a conference
- Annual Meetings
- Attend a conference
- Attend a workshop
- Employee Recruitment
- Field Work
- Other
- Planning meeting for research
- Presenter at a seminar/symposium
- Student Recruitment
- Team travel
- Training session

**Index**

12345

Type to search by:  TEXT  CODE  EITHER

(Code) Text

- (1234 ) General Athletics
- (1234 ) Athletics - Strength & Conditioning
- (1234 ) Athletics -Marketing & Promotions
- (1234 ) !Training Index









# Cost estimate segments

**Travel Request 2236**

Trip Title (Short Description): Fusion Conference - Travel Admin

Travel Request Header | **Segments** | Approval Flow | Audit Trail

**Add Segment**  
Click icon to create segment

 Air Fare
  Rail Fare
  Car Rental
  Lodging
  Dining (Meals)
  Miscellaneous

*Note: A red callout bubble points to the 'Segments' tab with the text 'Click here to add cost estimates'.*



## Dining - Meals

WSU Travel Policy specifies a daily fixed meal allowance

The allowance is based on the GSA *per diem*, *Meals & Incidentals* (MIE) rate for the **specific travel location / destination**

	Brkfst	Lunch	Dinner
<b>Outbound</b>			
Depart before 2:00p.m.		X	X
Depart after 2:00, before 8:00p.m.			X
<b>Inbound</b>			
Arrive before 12:00 / noon	X		
Arrive between noon & 6:00p.m.	X	X	
Arrive after 6:00p.m.	X	X	X



# Travel request segment - airfare

**Travel Request 33CA** Attachments Print / Email Delete Travel Request Submit Travel Request  
 Trip Title (Short Description): Attend Educational Conference Status: Not Submitted

Travel Request Header **Segments** Approval Flow Audit Trail

**Add Segment**  
 Click icon to create segment

**Air Ticket**  Round Trip  One Way Amount:  USD Save Cancel

Outbound

From:   
 To:   
 Date:   Depart at

Comment:

Return

Date:   Depart at

**Travel Request 33CA** Attachments Print / Email Delete Travel Request Submit Travel Request  
 Trip Title (Short Description): Attend Educational Conference Status: Not Submitted

Travel Request Header **Segments** Approval Flow Audit Trail

**Add Segment**  
 Click icon to create segment

**Air Ticket**  Round Trip  One Way Amount: 425.00 USD Save Cancel

Outbound

From: Detroit Wayne County Arpt,MI,United States of America  
 To: Las  
 McCarran Intl,NV,United States of America Click and select a location from the list.)  
 Date: All Countries

Comment:

- 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): Attend Educational Conference Status: Not Submitted  
Amount: \$425.00

Travel Request Header **Segments** Approval Flow Audit Trail

**Add Segment**  
Click icon to create segment

**Hotel Reservation** Amount:   **Save** **Cancel**

Check-In

City:

Date:   ▾

Detail:

Check-Out

Date:   ▾

- 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 33CA**

Trip Title (Short Description): Attend Educational Conference

Attachments ▾ Print / Email ▾ Delete Travel Request **Submit Travel Request**

Status: Not Submitted  
Amount: \$1,025.00

Travel Request Header

Segments

Approval Flow

Audit Trail

**Add Segment**  
Click icon to create segment

**Dining**

Amount:

**Save** **Cancel**

Start

Date:

Detail:

End

Date:

Comment:

- 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 : **33CA**  
Minimum Departure Date : **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 : [travelwayne@wayne.edu](mailto:travelwayne@wayne.edu)  
Default Manager Name : **Train0, Train0**  
Default Manager Email : [travelwayne@wayne.edu](mailto:travelwayne@wayne.edu)  
Country : **UNITED STATES**  
Org Unit 2-Dept ID : **Accounting**

---

Sender Name : **Train1, Train1**  
Email Address : [travelwayne@wayne.edu](mailto:travelwayne@wayne.edu)  
Default Manager Name : **Train0, Train0**  
Default Manager Email : [travelwayne@wayne.edu](mailto:travelwayne@wayne.edu)  
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)

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 : \$600.00

05/24/2012 Las Vegas (US) 05/27/2012

Allocations : 100.00% (\$425.00) Payroll-Accounting

### Air Ticket

Foreign Amount : \$425.00

05/27/2012 McCarran Intl (US) –Detroit Wayne County Arpt (US)

05/24/2012 Detroit Wayne County Arpt (US) –McCarran Intl (US)

Allocations : 100.00% (\$425.00) Payroll-Accounting

## Expenses

Transaction Date	Expense Type	Business purpose	Foreign Amount	Amount
05/24/2012	Airfare		\$425.00	\$425.00
05/24/2012	Lodging		\$600.00	\$600.00
05/24/2012	Fixed Meals		\$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 33CA

Trip Title (Short Description): Attend Educational Conference

Attachments Print / Email Cancel Travel Request Recall

Status: Submitted & Pending Approval  
Amount: \$1,225.00

Travel Request Header Segments Approval Flow **Audit Trail**

Travel Request Level				
Date/Time	Updated By	Action	Description	
05/21/2012 6:18 PM	Train1,Train1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:	
05/21/2012 6:18 PM	Train1,Train1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:	
Entry Level				
Date/Time	Updated By	Action	Description	
Segment Level				
Date/Time	Updated By	Action	Description	
05/21/2012 6:18 PM	Train1,Train1	Exception	You indicated you are attending a conference; return to the request header and attach the conference invitation.	
05/21/2012 6:18 PM	Train1,Train1	Exception	You indicated you are attending a conference; return to the request header and attach the conference invitation.	

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



# Travel Request – Approvers review



**Concur™** WAYNE STATE

My Concur Request Travel Expense Profile Help Log Out

My Concur - Train10 Train10 You are administering travel for: Me Search

On your smartphone book your travel and manage your expenses on the go!

[Learn more](#)

**Active Work**

[New Travel Request](#) [View Travel Requests](#)

**Travel Requests (2)** **Expense Reports (1)**

Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
<a href="#">San Francisco Donor</a>	<a href="#">224K</a>	Approved	04/23/2012 04/30/2012	USD 850.00	
<a href="#">Concur Conference</a>	<a href="#">224Y</a>	Approved	03/24/2012 03/27/2012	USD 700.00	

**Approval Queue**

Approve

**Travel Requests (1)** **Expense Reports (0)**

	Travel Request Name	Travel Request ID	Employee	Travel Request Dates	Date Submitted	Total
<input type="checkbox"/>	<a href="#">Presenter</a>	<a href="#">226M</a>	Train1, Train1	05/05/2012 05/09/2012	05/22/2012	USD 1,600.00

**Available Company Card Charges** [View All Charges](#)

Card Name	Card Number	Card Status	Total Unexpensed
TEST Corp Card	****0089	Active	USD 50.00
TEST Corp Card	****0090	Active	USD 321.30

All Cards [Select Expense Report](#) Concur Conference [Import](#)

**Travel Request Center - Train10 Train10**

**Travel Requests Pending your Approval (1)**

View	Travel Request Name	Employee Name	Travel Request ID	Travel Request Date...	Comment	Date Submitted	Total	Approve.	Remainin..
<input type="checkbox"/>	<a href="#">Presenter</a>	Train1, Train1	226M	05/05/2012 05/09/2012		05/22/2012	\$1,600.00	\$1,600.00	\$1,600.00



# Travel Request – Approvers review



## Travel Request 226M

Trip Title (Short Description): Presenter

[Attachments](#) ▾ | 
 [Print / Email](#) ▾ | 
 [Send Back Travel Request](#) | 
 [Approve](#) | 
 [Approve & Forward](#)

Status: Submitted & Pending Approval

Amount: \$1,600.00

[Travel Request Header](#) | 
 [Segments](#) | 
 [Approval Flow](#) | 
 [Audit Trail](#)

### Travel Request Level

Date/Time	Updated By	Action	Description
05/22/2012 8:45 AM	Train1,Train1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
05/22/2012 8:45 AM	Train1,Train1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
05/22/2012 8:46 AM	Train1,Train1	Travel Request Recall	Status changed from Submitted & Pending Approval to Sent Back to Employee Comment:
05/22/2012 8:54 AM	Train1,Train1	Workflow Step Added	Added a workflow step with approver : Train10,Train10
05/22/2012 8:54 AM	Train1,Train1	Workflow Step Removed	Removed a user-added workflow step with approver :
05/22/2012 9:02 AM	Train1,Train1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
05/22/2012 9:02 AM	Train1,Train1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
05/22/2012 3:36 PM	Train1,Train1	Travel Request Recall	Status changed from Submitted & Pending Approval to Sent Back to Employee Comment:



# Submit for approval – add an approver



My Concur Request Travel Expense Profile Help Log Out

View Travel Requests New Travel Request Approve Travel Requests Quick Search

Travel Request Center - Train1 trains Train1

## Travel Request 226M

Trip Title (Short Description): Presenter-2012 Symposium-DENVER

Save Workflow

Attachments

Print / Email

Cancel Travel Request

Submit Travel Request

Status: Sent Back to Employee

Amount: \$1,600.00

Travel Request Header

Segments

Approval Flow

Audit Trail

Manager Approval:

Train0, Train0



My Concur Request Travel Expense Profile Help Log Out

View Travel Requests New Travel Request Approve Travel Requests Quick Search

Travel Request Center - Train1 trains Train1

## Travel Request 226M

Trip Title (Short Description): Presenter-2012 Symposium-DENVER

Save Workflow

Attachments

Print / Email

Cancel Travel Request

Submit Travel Request

Status: Sent Back to Employee

Amount: \$1,600.00

Travel Request Header

Segments

Approval Flow

Audit Trail

User-Added Approver:



Manager Approval:

Train0, Train0





# Approver selection for “add a step”

**Travel Request 226M**  
Trip Title (Short Description): Presenter-2012 Symposium-DENVER  
Status: Sent Back to Employee  
Amount: \$1,600.00

Travel Request Center - Train1 trains Train1

Approval Flow

User-Added Approver:

- Train
- Train0, Train0 (travelwayne@wayne.edu)  
Employee ID: Train0  
Org Unit 2-Dept ID: Accounts Payable
- Train10, Train10 (travelwayne@wayne.edu)  
Employee ID: Train10  
Org Unit 2-Dept ID: Addiction Research Institute
- Train11, Train11 (travelwayne@wayne.edu)  
Employee ID: Train11  
Org Unit 2-Dept ID: Nutrition & Food Science
- Train12, Train12 (travelwayne@wayne.edu)  
Employee ID: Train12  
Org Unit 2-Dept ID: Uroloov

Search Approvers By



# Travel Request – Approvers review



Concur™



My Concur Request Travel Expense Profile Help Log Out

My Concur - Train10 Train10

You are administering travel for: Me Search

On your smartphone book your travel and manage your expenses on the go!

[Learn more](#)

**Trip Search**

Air/Rail Car Hotel Taxi Rail Flight Status

Round Trip One Way Multi-Segment

Departure City

Arrival City

Departure  depart 9:00am ± 3

Return  depart 5:00pm ± 3

Pick-up/Drop-off car at airport

Find a Hotel

**Active Work**

New Travel Request View Travel Requests

Travel Requests (2) Expense Reports (1)

Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
<a href="#">San Francisco Donor</a>	<a href="#">224K</a>	Approved	04/23/2012 04/30/2012	USD 850.00	
<a href="#">Concur Conference</a>	<a href="#">224Y</a>	Approved	03/24/2012 03/27/2012	USD 700.00	

**Approval Queue**

Approve

Travel Requests (1) Expense Reports (0)

	Travel Request Name	Travel Request ID	Employee	Travel Request Dates	Date Submitted	Total
<input type="checkbox"/>	<a href="#">Presenter</a>	<a href="#">226M</a>	Train1, Train1	05/05/2012 05/09/2012	05/22/2012	USD 1,600.00

**Available Company Card Charges** [View All Charges](#)

Card Name	Card Number	Card Status	Total Unexpensed
TEST Corp Card	****0089	Active	USD 50.00
TEST Corp Card	****0090	Active	USD 321.30

All Cards Select Expense Report Concur Conference Import

Travel Request Center - Train10 Train10

**Travel Requests Pending your Approval (1)**

View

	Travel Request Name	Employee Name	Travel Request ID	Travel Request Date...	Comment	Date Submitted	Total	Approve.	Remainin..
<input type="checkbox"/>	<a href="#">Presenter</a>	Train1, Train1	226M	05/05/2012 05/09/2012		05/22/2012	\$1,600.00	\$1,600.00	\$1,600.00





# Travel Request – Approvers review



**Travel Request 226M**  
Trip Title (Short Description): Presenter

Cancel Save Attachments Print / Email Send Back Travel Request **Approve** Approve & Forward

Status: Submitted & Pending Approval  
Amount: \$1,600.00

Travel Request Header Segments Approval Flow Audit Trail

Previous Comment View all

Entered By Train1 Train1: This is only a test

**Destination**  
Denver

**Travel Type**  
Out of State Travel

**Trip Title (Short Description)**  
Presenter

**Business Purpose**  
Presenter at a seminar/symposium

**Date of Departure**  
05/05/2012

**Date of Return**  
05/09/2012

**Index#?**  
(161471) General Disbursements

**Trip Detailed Description**  
Presenter at the annual test of the Concur syste

**Student Travel Award?**  
No

Student?

**Accompanied By:**  
Nobody

**Comment**

**Travel Request 226M**  
Trip Title (Short Description): Presenter

Attachments Print / Email Send Back Travel Request **Approve** Approve & Forward

Status: Submitted & Pending Approval  
Amount: \$1,600.00

Travel Request Header Segments Approval Flow Audit Trail

**Air Ticket** Allocate

Round Trip One Way Amount: \$450.00

Outbound

From:

To:

Date:

Comment:

**Dining** Allocate

Amount: \$200.00

Start

Date:

Detail:

**Hotel Reservation** Allocate

Amount: \$800.00

Check-In

City:

Date:



# Travel Request – Approvers review



## Travel Request 226M

Trip Title (Short Description): Presenter

Attachments ▾

Print / Email ▾

Send Back Travel Request

**Approve**

Approve & Forward

Status: Submitted & Pending Approval

Amount: \$1,600.00

Travel Request Header

Segments

Approval Flow

**Audit Trail**

### Travel Request Level

Date/Time	Updated By	Action	Description
05/22/2012 8:45 AM	Train1,Train1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
05/22/2012 8:45 AM	Train1,Train1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
05/22/2012 8:46 AM	Train1,Train1	Travel Request Recall	Status changed from Submitted & Pending Approval to Sent Back to Employee Comment:
05/22/2012 8:54 AM	Train1,Train1	Workflow Step Added	Added a workflow step with approver : Train10,Train10
05/22/2012 8:54 AM	Train1,Train1	Workflow Step Removed	Removed a user-added workflow step with approver :
05/22/2012 9:02 AM	Train1,Train1	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
05/22/2012 9:02 AM	Train1,Train1	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:
05/22/2012 3:36 PM	Train1,Train1	Travel Request Recall	Status changed from Submitted & Pending Approval to Sent Back to Employee Comment:

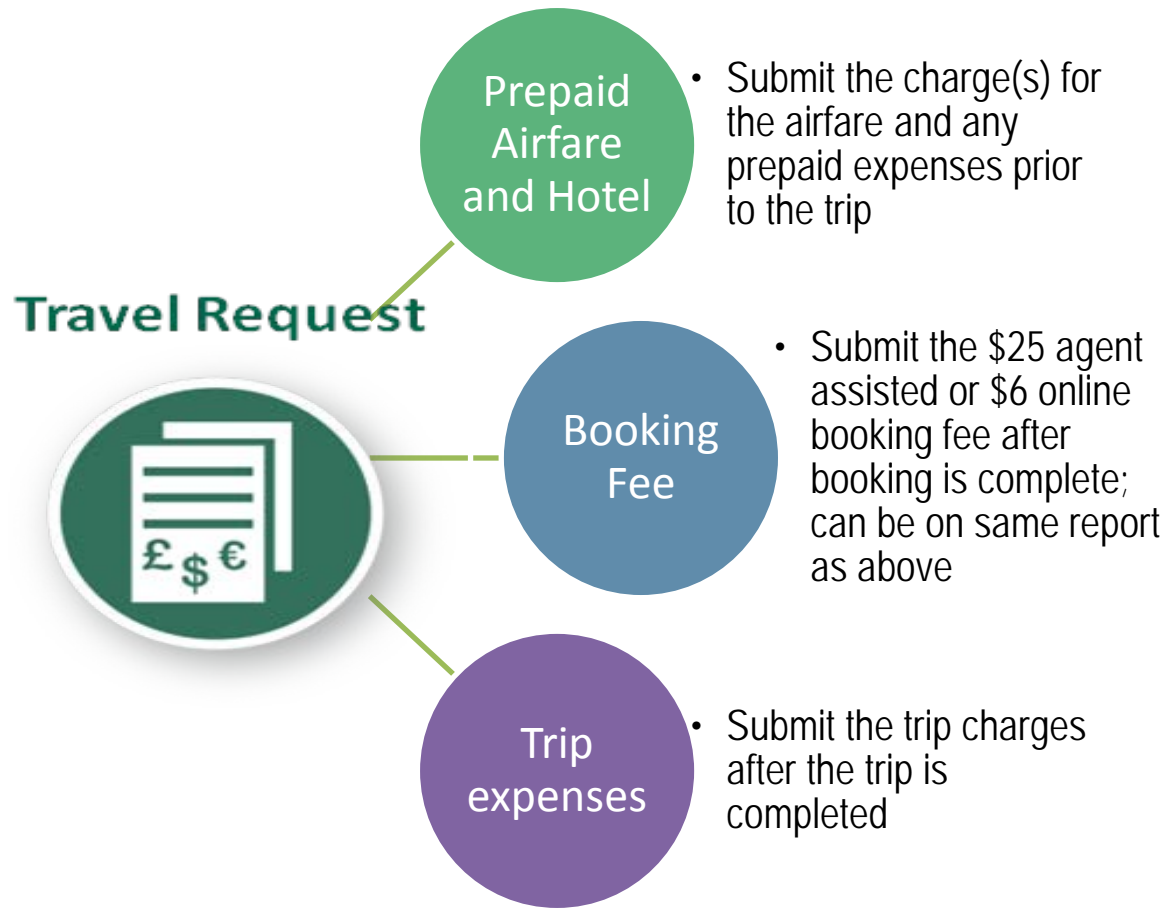


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# Many expense reports can be tied to one travel request





# Create an expense report from the approved travel request in Concur

My Concur - Train21 Train21

You are administering travel for: Me

Active Work

New Travel Request View Travel Requests

Travel Requests (2) Expense Reports (0)

	Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
	<a href="#">Las Vegas</a>	<a href="#">224H</a>	Approved	07/18/2012 07/21/2012	USD 600.00	
	<a href="#">Conference</a>	<a href="#">225U</a>	Approved	04/06/2012 04/19/2012	USD 1,875.00	

Create an expense report from this travel request

Available Company Card Charges [View All Charges](#)

Card Name	Card Number	Card Status	Total Unexpensed
TEST Corp Card	***0047	Active	USD 633.14

Select Expense Report: New Expense Report Import

	Charge	Expense	Transaction Date	Amount
<input type="checkbox"/>	PRO SPORTS CLUB, BELLEVUE, WA	Undefined	05/14/2011	USD 8.70
<input type="checkbox"/>	BEAR CREEK GC 431, WOODINVILLE, WA	Undefined	05/11/2011	USD 300.00
<input type="checkbox"/>	SHERATON SUITES, ALEXANDRIA, VA	Hotel	05/08/2011	USD 209.85
<input type="checkbox"/>	DORAL WAY MIA, MIAMI, FL	Undefined	05/08/2011	USD 19.59
<input type="checkbox"/>	BLUE DOOR AT DELANO, MIAMI 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

**Concur** WAYNE STATE

My Concur Request Travel Expense Profile Help Log Out

View Charges View Reports New Expense Report View Receipt Store Approve Reports

Expense Center - Train21 Train21

### Create a New Expense Report

#### Report Header

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

Index: (147291) Academic College Enrichment S | Trip Detailed Description: | Student Travel Reward?: No | Guest?:  | Student?:  | Accompanied By: |

Report Date: 05/23/2012 | **Travel Request ID:** | Comment: | Dept ID: Anatomy | Address: 5700 AAB | City: Detroit

State/Province: MI | Country: US | Zip/Postal Code: 48202

Travel Requests						
Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining	
<input type="checkbox"/> Conference	225U	No	\$1,875.00	\$1,875.00	\$1,875.00	<input type="button" value="Add"/> <input type="button" value="Remove"/>

- 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 Report: Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Itinerary Info

Itinerary Name  
Conference

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City ^	Arrival City	Arrival Rate Location
--------------------------	------------------	--------------	-----------------------

### New Itinerary Stop

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

Save

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 Report: Conference

Edit Itinerary | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary

### Itinerary Info

Itinerary Name  
Conference

Add Stop | Delete Rows | Import Itinerary

<input type="checkbox"/>	Departure City ^	Arrival City	Arrival Rate Location
<input checked="" type="checkbox"/>	Detroit, Michigan 04/06/2012 3:00 PM	Washington, District of Columbia 04/06/2012 5:00 PM	DISTRICT OF COLUMBIA, US-DC, US
<input type="checkbox"/>	Washington, District of Columbia 04/19/2012 1:00 PM	Detroit, Michigan 04/19/2012 3:00 PM	WAYNE COUNTY, US-MI, US

### Edit Itinerary Stop

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

Save

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





# Meal itinerary needed for per diem calculation

## Travel Allowances For Report: Conference

**Edit Itinerary** | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary

**Itinerary Info**

Itinerary Name  
Conference

Add Stop | Delete Rows | Import Itinerary

<input type="checkbox"/>	Departure City ^	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Detroit, Michigan 04/06/2012 3:00 PM	Washington, District of Columbia 04/06/2012 5:00 PM	DISTRICT OF COLUMBIA, US-DC, US
<input checked="" type="checkbox"/>	Washington, District of Columbia 04/19/2012 1:00 PM	Detroit, Michigan 04/19/2012 3:00 PM	WAYNE COUNTY, US-MI, US

**Edit Itinerary Stop**

Depart from (city)  
Washington, District of Columbia

Date  
04/19/2012

Time  
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



# Expense report - meals

Travel Allowances For Report: ABCD Annual Conference

Create New Itinerary | Available Itineraries | **Expenses & Adjustments** | Reimbursable Allowances Summary

Show dates from  to  Go

Exclude   ... <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	06/04/2012 Dallas, Texas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.00
<input type="checkbox"/>	06/05/2012 Dallas, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	06/06/2012 Dallas, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	06/07/2012 Dallas, Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$35.00

**Expenses** Delete Copy View <<

<input type="checkbox"/>	Date	Expense	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	06/07/2012	<b>Fixed Meals</b> Dallas, Texas	\$35.00	\$35.00
<input type="checkbox"/>	06/06/2012	<b>Fixed Meals</b> Dallas, Texas	\$71.00	\$71.00
<input type="checkbox"/>	06/05/2012	<b>Fixed Meals</b> Dallas, Texas	\$71.00	\$71.00
<input type="checkbox"/>	06/04/2012	<b>Fixed Meals</b> Dallas, Texas	\$59.00	\$59.00
			<b>TOTAL AMOUNT</b>	<b>TOTAL REQUESTED</b>
			<b>\$236.00</b>	<b>\$236.00</b>



# Expense report - meals

test

New Expense Import Details Receipts Print / Email

Expenses Delete Copy View

<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	06/04/2012	Fixed Meals Milwaukee, Wisconsin	\$61.00	\$61.00
<input type="checkbox"/>	06/03/2012	Fixed Meals Milwaukee, Wisconsin	\$61.00	\$61.00
<input type="checkbox"/>	06/02/2012	Fixed Meals Milwaukee, Wisconsin	\$61.00	\$61.00
<input type="checkbox"/>	06/01/2012	Fixed Meals Milwaukee, Wisconsin	\$61.00	\$61.00
<input type="checkbox"/>	05/14/2011	Miscellaneous BURGER KING NS PHX, Phoenix, Ariz	\$7.22	\$0.00
<input type="checkbox"/>	05/08/2011	Miscellaneous SPAZZO ITALIAN GRILL 211, Redmond	\$49.39	\$0.00

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.



# Expense report – import card charges

The screenshot shows the Concur Expense Center interface for a 'Conference' report. The main area is divided into two sections: 'Expenses' and 'Smart Expenses'.

**Expenses Table:**

Date	Expense	Amount	Requested
04/19/2012	Fixed Meals Washington, District c	\$35.00	\$35.00
04/18/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/17/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/16/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/15/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/14/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/13/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/12/2012	Fixed Meals Washington, District c	\$71.00	\$71.00
04/11/2012	Fixed Meals Washington, District c	\$71.00	\$71.00

**Smart Expenses Table:**

Expense Detail	Expense	Date	Amount
Corporate Card Charges			
PRO SPORTS CLUB BELLEVUE WA	Undefined	05/14/2011	\$8.70
BEAR CREEK GC 431 WOODINVILLE...	Undefined	05/11/2011	\$300.00
Sheraton ALEXANDRIA VA	Hotel	05/08/2011	\$209.85
DORAL WAY MIA MIAMI FL	Undefined	05/08/2011	\$19.59
BLUE DOOR AT DELANO MIAMI BE...	Undefined	05/07/2011	\$95.00

**Summary:**

TOTAL AMOUNT	TOTAL REQUESTED
\$928.00	\$928.00

- Select the credit card charges to be added to this expense report and click on the “import” tab



# Imported card charge - Hotel

<input type="checkbox"/>	Date	Expense	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	04/10/2012	Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/09/2012	<b>Fixed Meals</b> Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/08/2012	<b>Fixed Meals</b> Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/07/2012	<b>Fixed Meals</b> Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/06/2012	<b>Fixed Meals</b> Washington, District of Columbia	\$41.00	\$41.00
<input type="checkbox"/>	05/08/2011   	<b>Hotel</b> SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85
			<b>TOTAL AMOUNT</b> <b>\$1,137.85</b>	<b>TOTAL REQUESTED</b> <b>\$1,137.85</b>



# Imported card charge details

The screenshot displays the Concur Expense Center interface for a conference report. The main area shows a list of expenses with a pop-up window providing detailed information for a specific charge.

**Expense Center - Train21 Train21**

**Conference** [Delete Report] [Submit Report]

[New Expense] [Import] [Details] [Receipts] [Print / Email] [Hide Exceptions]

**Exceptions**

Expense	Date	Amount	Exception
Hotel			
Hotel			

**Expenses**

Adding New Expense

Date	Description	Amount	Requested
04/10/2011	Sheraton (TEST Corp Card - 0047)	\$209.85	\$209.85
04/09/2011	American Express CREDIT CARD#: xxx0047		
04/08/2011	Transaction Amount	\$209.85	
04/07/2011	Ref #: T064915807128501 SHERATON HOTELS SHER ALEXANDRIA		
04/06/2011	Guest Name: 0, Number of Nights: 0, Folio Number: 8762530770		
05/08/2011	SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85

**Imported from Credit Card**

TOTAL AMOUNT: **\$1,137.85** | TOTAL REQUESTED: **\$1,137.85**

**New Expense** [Receipt Store]

Expense: \_\_\_\_\_

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Lodging	Other	...Other	...Team Expenses	...Transportation
Hotel	Booking Fees	Miscellaneous	Practice Fees	Car Rental
Meals and Entertainment	Conference Registration Fee	Postage	Team Meals	Gasoline
Breakfast	Duplicating	Supplies (Office)	Team Supplies & Equipment	Parking
Business Meal (attendees)	Individual Membership Fees	Telephone Expense	Transportation	Personal Car Mileage
Dinner	Internet Fees	Travel Visa	Airfare	Shuttle Bus/Metro Car
Entertainment	Laundry	Team Expenses	Airline Fees (Baggage etc)	Subway
Lunch	Meeting Room Fees	Equipment Repair	Bus	Taxi
...Transportation				

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

# Complete and Submit Expense Report



## Itemize the hotel expenses

Expense	Date	Amount	Exception
Hotel	05/08/2011	\$209.85	Itemizations are required for this entry.

Expenses				Expense			Nightly Lodging Expenses			Receipt Store
<input type="checkbox"/>	Date	Expense	Amount	Requested	Check-in Date	Check-out Date	Number of Nights			
<input type="checkbox"/>	04/10/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00		05/08/2011				
<input type="checkbox"/>	04/09/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00						
<input type="checkbox"/>	04/08/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00						
<input type="checkbox"/>	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00						
<input type="checkbox"/>	04/06/2012	Fixed Meals Washington, District of Columbia	\$41.00	\$41.00						
<input checked="" type="checkbox"/>	05/08/2011	Hotel	\$209.85	\$209.85						

Recurring Charges (each night)	
Room Rate	Room Tax
Other Room Tax 1	Other Room Tax 2

Room rate and taxes will be shown as separate expenses

Additional Charges (each night)	
Expense	Amount
Choose an expense type	

TOTAL AMOUNT	TOTAL REQUESTED
\$1,137.85	\$1,137.85

Save Itemizations Cancel

- Enter the hotel folio details by day



# Itemize the hotel expenses

Expenses Delete Copy View << Expense Nightly Lodging Expenses Receipt Store

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input type="checkbox"/>	04/10/2012	Washington, District of Columbia	\$1,100.00	\$1,100.00
<input type="checkbox"/>	04/09/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/08/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/07/2012	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/06/2012	Fixed Meals Washington, District of Columbia	\$41.00	\$41.00
<input checked="" type="checkbox"/>	05/08/2011	Hotel SHERATON SUITES, Alexandria, Virginia	\$209.85	\$209.85

Itemizations are required for this entry

TOTAL AMOUNT: \$1,137.85 | TOTAL REQUESTED: \$1,137.85

Check-in Date: 04/06/2012 | Check-out Date: 04/07/2012 | Number of Nights: 1

Recurring Charges (each night)

Room Rate: 200.00	Room Tax: 9.85
Other Room Tax 1:	Other Room Tax 2:

Room rate and taxes will be shown as separate expenses

Additional Charges (each night)

Expense	Amount
Choose an expense type	

Save Itemizations Cancel

- Enter the hotel folio details by day - “save itemizations”



# Complete and Submit Expense Report



## Add a new out-of-pocket expense item

Navigation: New Expense | Import | Details | Receipts | Print / Email

Expenses | New Expense | Receipt Store

Date	Expense	Amount	Requested
Adding New Expense			
<input type="checkbox"/>	04/19/2012 Fixed Meals Washington, District of Columbia	\$35.00	\$35.00
<input type="checkbox"/>	04/18/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/17/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/16/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/15/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/14/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/13/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/12/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	04/11/2012 Fixed Meals Washington, District of Columbia	\$71.00	\$71.00

TOTAL AMOUNT: \$1,137.85 | TOTAL REQUESTED: \$1,137.85

**New Expense Form:**

Expense Type: Taxi | Transaction Date: 05/08/2011 | Business Purpose: [ ]

Vendor Name: [ ] | From Location: [ ] | To Location: [ ]

Payment Type: Cash | Amount: 55.00 | USD |  Personal Expense (do not reimburse)

Comment: [ ]

Buttons: Save | Itemize | Allocate | 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 University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
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 claimed I assume responsibility for repaying Wayne State University in full for those expenses.

Accept & Submit

Cancel



# Expense report – review & summary

### 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 University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
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 claimed I assume responsibility for repaying Wayne State University in full for those expenses.

**Reminder: Receipts Required!**

According to company policy, you must provide receipts for the expenses listed below.  
You may attach scanned images to individual expenses or to the report.

	Expense	Date	Amount
i	<b>Airfare</b> Delta Air Lines, Dallas, Texas	06/01/2012	\$400.00
i	<b>Hotel</b> Drury Inn & Suites, Dallas, Texas	06/04/2012	\$499.98

## Report Totals - NACUBO

### Expense Report

Report Total :	\$2,504.74
Less Personal Amount :	\$709.51
Amount Claimed :	\$1,795.23
Amount Rejected :	\$0.00

### Company Disbursements

Amount Due Employee :	\$390.10
Amount Due JP Morgan Mastercard :	\$1,405.13
Total Paid By Company :	\$1,795.23

### Employee Disbursements

Amount Owed Company :	\$0.00
Amount Owed Company Card JP Morgan Mastercard :	\$709.51
Total Owed By Employee :	\$709.51



# Expense report – Approver's Review



My Concur Request Travel Expense Administration Profile Help Log Out

My Concur - Train0 Train0 You are administering travel for: Me Search Proxy Search

On your smartphone book your travel and manage your expenses on the go!

[Learn more](#)

**Approval Queue**

Travel Requests (3) Expense Reports (2)

Report Name	Employee	Report Date	Requested Amount
<a href="#">Testing test</a>	Train30, Train30	05/19/2012	USD 167.00
<a href="#">Meeting on Summer Session Proj</a> Planning meeting on summer session project	Train1, Train1	05/04/2012	USD 319.00

**Expense Center - Train0 Train0** Proxy Search

**Meeting on Summer Session Proj** [Train1, Train1] Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email

**Expenses** View <<

Transaction Date	Expense Type	Vendor Name	Business Purpose	City	Payment Type	Amount	Adjusted Claim...
05/09/2012	Fixed Meals			Denver, Colorado	Cash	\$66.00	\$66.00
05/08/2012	Fixed Meals			Denver, Colorado	Cash	\$66.00	\$66.00
05/07/2012	Fixed Meals			Denver, Colorado	Cash	\$66.00	\$66.00
05/06/2012	Fixed Meals			Denver, Colorado	Cash	\$66.00	\$66.00
05/05/2012	Fixed Meals			Denver, Colorado	Cash	\$55.00	\$55.00

**Summary**

**Report Summary**

[Report Totals](#)

Amount Due Company	Amount Due Employee
\$0.00	\$319.00

**Travel Requests (1)**

Name	Request ID	Amount ...	Amount ...
<a href="#">Meeting ...</a>	2245	\$828.00	\$828.00



# Expense report – Approver's Review



Report header for: Meeting on Summer Session Proj

<b>Destination</b> Miami, Florida	<b>Travel Type</b> Out of State Travel	<b>Trip Title (Short Description)</b> Meeting on Summer Session Proj	<b>Business Purpose</b> Planning meeting for research
<b>Date of Departure</b> 06/21/2012	<b>Date of Return</b> 06/22/2012		
<b>Index</b> (128271) MPSS Credit Programs-Admin	<b>Trip Detailed Description</b> Planning meeting on summer session project	<b>Student Travel Reward?</b> No	<input type="checkbox"/> Guest?
<b>Report Date</b> 05/04/2012	<b>Travel Request ID</b> 2245	<input type="checkbox"/> Student?	<b>Accompanied By:</b> Terry Margolis
<b>Dept ID</b> Accounting	<b>Report Key</b> 151	<b>Comment</b>	<b>Employee Name</b> Train1, Train1
		<b>Report Id</b> F6D9A70B32334CEFB50C	<b>Report Currency</b> US, Dollar
<b>Approval Status</b> Submitted & Pending Approval	<b>Payment Status</b> Not Paid	<b>Receipts Received</b> No	<b>Submit Date</b> 05/23/2012
		<b>Address</b> 6180 h	<b>City</b> t

### Final Confirmation

**Approver Receipts**

By clicking on the 'Accept' button, I certify that:

- 1) the receipts have been reviewed and support the itemized expenses.
- 2) The expenses claimed herein are reasonable and in compliance with the WSU Travel Policy.



## Expense report – Approver's Review



- The approver can elect to add another individual for approval purposes by using the 'Approve and Forward'
  - Exception requires additional approval
  - Split accounting across multiple schools



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# Update your user profile

---

- 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

The screenshot shows the Concur homepage with a blue header bar containing the Concur logo and navigation links: My Concur, Request, Travel, Expense, Profile, Help, and Log Out. Below the header is a green banner with the text "My Concur - Train1 Train1" and a search bar indicating "You are administering travel for: Me". The main content area is divided into several sections:

- Smartphone Promotion:** A box on the left encourages users to book travel and manage expenses on their smartphones, accompanied by a smartphone image showing the Concur app interface.
- Approval Queue:** A section titled "Approval Queue" with sub-sections for "Travel Requests (0)" and "Expense Reports (0)". It contains a table with columns: Report Name, Employee, Report Date, and Requested Amount. The table is currently empty, displaying "No records found."
- Trip Search:** A section with tabs for "Air/Rail", "Car", "Hotel", "Taxi", "Rail", and "Flight Status". It includes radio buttons for "Round Trip", "One Way", and "Multi-Segment", and input fields for "Departure City" and "Arrival City" with "Select nearby airports" links.
- Trip List:** A section titled "Trip List" with a message: "You have no upcoming trips. See trip library for complete list."
- Active Work:** A section titled "Active Work" with buttons for "New Expense Report" and "View Reports", and sub-sections for "Travel Requests (7)" and "Expense Reports (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

My Concur Request Travel Expense **Profile** Help Log Out

Personal Information Change Password System Settings Mobile Registration

## My Profile Profile Options

Select one of the following to customize your user profile.

-  **Personal Information**  
Your home address and emergency contact information.
-  **Company Information**  
Your company name and business address or your remote location address.
-  **Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
-  **E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.
-  **Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.
-  **Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
-  **Mobile Registration**  
Set up PIN to access Concur for mobile on your BlackBerry or Windows Mobile Device
-  **System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
-  **Contact Information**  
How can we contact you about your travel arrangements?
-  **Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.
-  **Travel Preferences**  
Carrier, Hotel, Rental Car and other travel-related preferences.
-  **Travel Request Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
-  **Change Password**  
Change your password.

- 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




# Payment

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- Default user profile setting is 'Employee ACH' (direct deposit)
- When your log on is activated – update your banking information for direct deposit immediately
- A penny test will be conducted and you must verify that it completed successfully before your expense report can be submitted for payment
- Out of pocket expenses will be deposited in 3 business days after final approval




# Conlin Travel - Online booking or agent-assisted



TravelWayne

Welcome to the  
Travel Hub



Conlin Travel  
People. Technology. Results.

Today is Tuesday, May 08, 2012
TRAVEL HUB HOME
ONLINE ACCESS
CONTACT US


**Online Access** ▶

Need travel arrangements? Go online 24 hours a day!

**Contact Us** ▶

Available all day, every day for your convenience.

Check your Flight Status with our  
**Interactive Flight Tracker**



**Get Ready**

Exciting changes are coming to the Wayne State travel program.


- State-of-the-art online booking
- 24 hour travel support
- Travel vendor programs and benefits
- Comprehensive travel policy

**Next Steps**

Workshops and travel seminars are being planned now. Stay tuned for email announcements.

**Who is Conlin Travel?**

We have been meeting the travel needs of businesses around the world for over 50 years, and we look forward to offering our expertise to each of you. As your partner our goal is to bring value by providing state-of-the-art technology. [READ MORE>](#)



**Check In Online**

- Air France
- Air Tran
- Alaska Air
- American Airlines
- British Airways
- Delta

**In the News...from USA Today: Today in the Sky**

[Opening of new Berlin airport is delayed](#)


German officials say the planned opening of Berlin's new airport next month must be delayed because of fire safety issues.

*Publ.Date : Tue, 08 May 2012 17:46:00 GMT*

[American touts codesharing, bigger regional jets](#)


American Airlines will keep its emphasis on international flights and hopes to make more efficient use of the smaller jets in its fleet.

**Travel Tools**

 **ONLINE ACCESS**

- Book Online
- View a tutorial
- Concur Guides

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 **SECURITY**

- 3-1-1 Rule
- Travel Security Advisories
- Travel Health



# Updating your profile

A screenshot of the Concur web application interface. The top navigation bar is blue and contains the Concur logo, a red arrow pointing to the 'Profile' link, and other links: 'My Concur', 'Request', 'Travel', 'Expense', 'Profile', 'Help', and 'Log Out'. Below the navigation bar is a green banner with the text 'My Concur - Train18 Train18'. The main content area is divided into two sections. On the left, there is a promotional box for the Concur mobile app with the text 'On your smartphone book your travel and manage your expenses on the go!' and a 'Learn more' button. On the right, there is a section titled 'Active Work' with a '+ New Expense Report' button and a 'View Rep' button. Below this, there are tabs for 'Travel Requests (5)' and 'Expense Report'. A table is visible with a header 'Report Name' and a row containing the text 'Presenter at COE conference 7/1'.

When you receive your login information near your cohort start date... focus on updating your profile.

Travelers should complete their own. Arrangers also need to complete theirs for required information.



# Updating your profile

Numerous links – but most will open in one long page.  
Start with the “Personal Information”.



# Updating your profile

**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you use for airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name [Required]	Middle Name [Required]	Nickname	Last Name [Required]
<input type="text" value=""/>	<input type="text" value="Train18"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Train18"/>
		<input checked="" type="checkbox"/> No Middle Name		

## Name - The TSA affect:

- First and middle name run together
- No Prefix or suffix
- Legal name
- Take it seriously – TSA does



# Updating your profile

**Travel Preferences**  
Eligible for the following discount travel rates/fare classes  
 AAA  Government  Military  Senior/AARP

**Air Travel Preferences**  
Seat: Don't Care | Row: Don't Care | Special Meals: Regular Meal | Ticket Delivery: E-ticket when possible  
Preferred Departure Airport: | Other Air Travel Preferences: | Medical Alerts:

**Hotel Preferences**  
Room Type: King | Smoking Preference: Non-smoking  
 Foam pillows  Rollaway bed  Crib | Message to Vendor:  
I prefer hotel that has:  
 a gym  a pool  a restaurant  room service  Early Check-in  
Accessibility Needs:  
 Wheelchair access  Blind accessible

**Car Rental Preferences**  
Car Type: Any Car Class | Smoking Preference: Don't Care | Car Transmission: Automatic  
Message to Vendor:

**Frequent-Traveler Programs**  
Your Frequent Traveler, Driver, and Hotel Guest Programs

Take advantage of discounts and frequent flyer programs.

Add your preferences – policy takes precedence.





# Updating your profile

## TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, we may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policy, visit our site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender [Required]	Date of Birth (mm/dd/yyyy) [Required]	DHS Redress No.	TSA Pre✓ Known Traveler Number
<input type="radio"/> Male <input checked="" type="radio"/> Female	<input type="text" value="xx/xx/xxxx"/>	<input type="text"/>	<input type="text"/>

Save

## Secure Flight

Gender and birth date required. Birth date encrypted.

DHS Redress Number – Program to help if your name resembles that of someone on a watch list.

TSA Precheck – great program for reduced security line recently rolled out to the public. Visit the TSA.gov website.



# Updating your profile

**Assistants and Travel Arrangers**

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

**Your Assistants and Travel Arrangers**

You currently have no assistants defined.

Save

**Credit Cards**

You currently have the following credit cards saved with your profile.

**Your Credit Cards**

		Test	xxxx-xxxx-xxxx-1111	Exp: 06/2014	
--	--	------	---------------------	--------------	--

Add an assistant to allow that person access to book travel on your behalf.

Add credit card information to be utilized for bookings.



# Updating your profile

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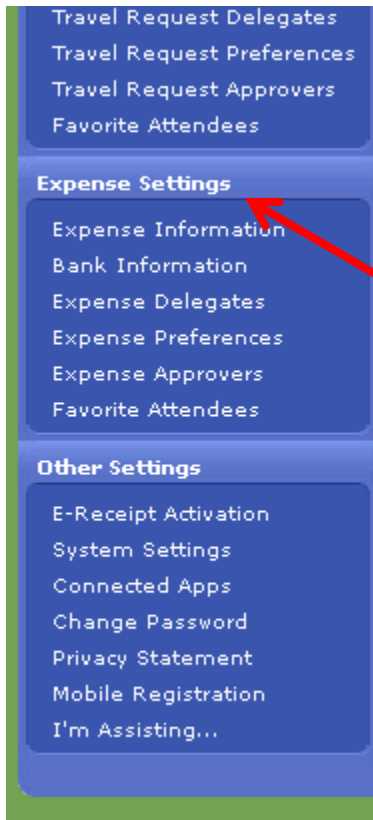


**Save**

Don't forget to save. Many Save buttons, pick any one.



# Updating your profile



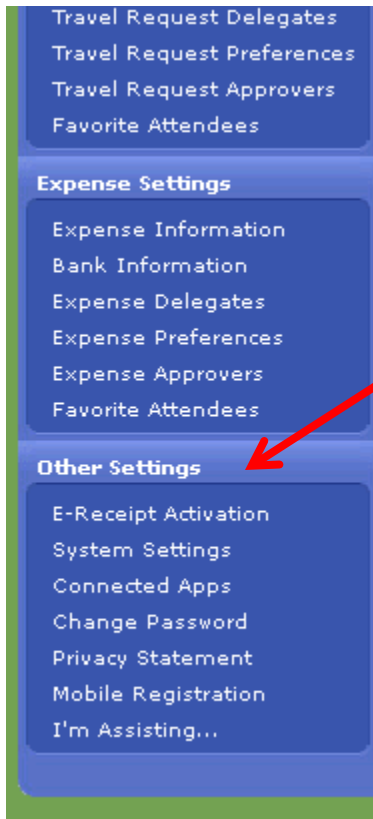
Visit the Expense Settings to update your bank information for direct deposit reimbursement.

**Your data is safe and secure!**





# Updating your profile



## Other settings:

- E-Receipt Activation
- Mobile App Registration
- System Settings
  - Set what emails you wish to receive.



# Booking Travel

**Trip Search**

**Air/Rail** | Car | Hotel | Taxi | Rail | Flight Status

Round Trip |  One Way |  Multi-Segment

**Departure City** [?](#) DTW  
DTW - Detroit Wayne County Arpt - Detroit, MI [⚙](#)  
[Select nearby airports](#)

**Arrival City** [?](#)  
  
[Select nearby airports](#)

**Departure** [?](#)  
 depart  9:00am  ± 3

**Return** [?](#)  
 depart  5:00pm  ± 3

Pick-up/Drop-off car at airport

Find a Hotel

Specify airline [?](#)  Refundable only air fares

**Class of service:** Economy class  [?](#)

Search flights by:  Price |  Schedule

Flights w/ no double connections:

## Features:

- Live inventory
- Built in contracts and discounts including AMEX hotels
- Unused ticket display
- Southwest integration
- User friendly interface and fast results
- Automated receipt push to expense
- 50+ years of experience of Conlin Travel



# Booking Travel

**Trip Search**

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**Departure** [?](#)  
 depart  9:00am  ± 3  [⏪](#)

**Return** [?](#)  
 depart  5:00pm  ± 3  [⏪](#)

Pick-up/Drop-off car at airport

Find a Hotel

Specify airline [?](#)  Refundable only air fares

Class of service: Economy class  [?](#)

Search flights by:  Price |  Schedule

Flights w/ no double connections:

# Let's take a look!



## We reviewed these main sections

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- 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





# Training opportunities

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## **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](http://Travel.Wayne.edu)

## **Conlin Travel Hub**

- Online booking training videos, Travel information & more located at [Conlintravelhub.com/ws](http://Conlintravelhub.com/ws)

*Training is available but not required*



# TravelWayne support options

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- Call **313-577-TRIP (8747)** for TravelWayne support options
- Visit **[Travel.Wayne.edu](http://Travel.Wayne.edu)** to view the travel policy and information to help you get started
- Visit **[www.conlintravelhub.com/ws](http://www.conlintravelhub.com/ws)** for a wealth of travel tips, online booking training videos and much more
- Contact your **Unit Implementation Coordinator(s)** for onsite assistance

# Q & A

