

TravelWayne

User Guide
Version 1.2

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Section 1: Introduction

Think of TravelWayne as a system, not just a software application. Merriam-Webster defines system as, "a group of related parts that move or work together; an organized or established procedure." So, let's examine the "parts" and the "procedure."

TravelWayne Procedure

TravelWayne provides an integrated, systematic approach for processing all the components of the travel process. It eliminates the need for processing paper documents, and if used appropriately, simplifies the process for the traveler.

1. Plan Your Travel
 - a. Obtain estimates for air/rail travel, car rental, lodging, meals, and miscellaneous expenses.
 - b. Complete a travel request
 - c. Submit the travel request for approval
 - d. Review and approve travel request (must be approved before booking travel)
2. Book Your Travel
 - a. Book travel online (Concur), *or*
 - b. Use Conlin Travel agent to book travel
3. Conduct Your Travel
 - a. Collect paper receipts for out-of-pocket expenses
 - b. Use eReceipts for expenses paid for with your WSU Travel Card (eReceipts must be enabled to use)
4. Expense Your Travel
 - a. Create an expense report
 - b. Allocate expenses
 - c. Attach receipts and supporting documentation
 - d. Submit expense report for approval
5. Reimbursed for Your out-of-pocket Travel Expenses (if applicable)

TravelWayne Components

The only required "tool" associated with TravelWayne is the use of **Concur** to create, submit, review and approve travel requests and expense reports. However, becoming comfortable with using the other related tools will simplify and enhance your travel experiences. Here is a list of the tools available to you:

1. Concur (Software Application) is used for:
 - Estimate travel expenses
 - Create and submit travel requests
 - Review and approve travel requests
 - Book travel
 - Create, allocate, and submit expense reports
 - Review and approve expense reports
2. Conlin Travel Agents (optional)
 - Travel assistance
 - Book travel

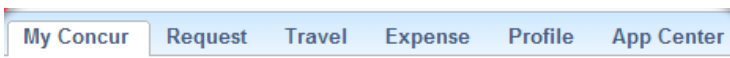
3. Conlin Travel Website (optional)
 - New traveler tips and hints
 - Travel tools
 - Travel security information
 - Passport and visa information
 - Online airline check in
 - Travel news from USA Today
4. Travel Card (JP Morgan Chase MasterCard) (optional)
 - Book travel expenses
 - Charge travel related expenses
5. Concur Mobile (optional)
 - Remote access to TravelWayne
6. Triplt Pro (optional)
 - Organize itinerary
 - Travel updates
 - Travel notifications
7. National Car Rental Emerald Club Membership (optional)
 - Bypass rental counter
 - Choice of vehicle
 - Expedited vehicle return
8. eReceipts (optional)
 - Electronically associate receipts with specific expenses

My Concur Tab

The screenshot shows the My Concur Tab interface with the following sections highlighted by numbered callouts:

- 1 Tab Bar:** The top navigation bar containing 'My Concur', 'Request', 'Travel', 'Expense', 'Profile', and 'App Center'.
- 2 Trip Search:** The main search area for planning flights, hotels, and other travel arrangements.
- 3 Weather Forecaster:** A section for checking local weather conditions.
- 4 Travel Alerts:** A section for receiving alerts about travel reservations and receipts.
- 5 Travel Info:** A section providing general information and a welcome message for Wayne State Travelers.
- 6 Company Info:** A section with various links for company-related information, including expense reports and travel policies.
- 7 Active Work:** A section for managing active work requests, including a table for 'Requests' and 'Expense Reports'.
- 8 Trip List:** A section for viewing a list of past and upcoming trips.

1 Tab Bar



For the traveler, the Tab Bar provides access to the following functions:

My Concur Essentially, this is the Concur home page. Clicking this tab will always bring you back to the home page. There is no hover-over submenu.

Request Clicking the **Request** tab will display a list of active travel request. This list will also contain those request that have been submitted for approval and those that have been approved. Hovering over the **Request** tab will invoke a submenu with the following options:

- View Requests
- New Requests
- Quick Search (for Requests)

Travel Clicking the **Travel** tab will display the **Travel Search** tool. Hovering your mouse pointer over the **Travel** tab will invoke a submenu with the following options:

- Home
- Trip Library
- Templates
- Policy
- Profile
- Tools

Expense Clicking the **Expense** tab will display a list of active expense reports. Hovering your mouse pointer over the **Expense** tab will invoke a submenu with the following options:

- View Reports
- New Expense reports
- View Receipt Store

Profile Clicking the **Profile** tab will display a screen of profile options. Hovering your mouse pointer over the **Profile** tab will invoke a submenu with the following options:

- Personal Information
- System Settings
- Mobile Registration

App Center Clicking the **App Center** tab displays a series of PC and mobile device applications. There is no hover-over submenu.

2

Trip Search

Trip Search

Trip Search is a tool for planning travel arrangements. With this tool you can locate the following:

- Flight travel dates, times, and prices.
- Car Rentals
- Hotel Accommodations
- Taxi Services
- Railway travel dates, times, and prices
- Flight Status

3

Weather Forecaster

The screenshot shows the 'Weather' section of the application. At the top, there is a header 'Weather'. Below it is a box labeled 'Local Weather'. Underneath that is a search input field with the placeholder text 'Please enter an airport.' and a small globe icon to the right. Below the input field is a horizontal line.

By typing in a city name or 3-letter airport code, and Concur will display a current weather report for that location.

4 Travel Alerts

Travel Alerts

Allows connecting your itineraries to **Triplt** automatically and sign up for E-Receipts for cars and hotels.

5 Travel Info

Travel Info

This section provides you with important contact information. It contains phone numbers, email addresses, and links to help you use Concur and connect you with Conlin Travel.

6 Company Info

Company Info

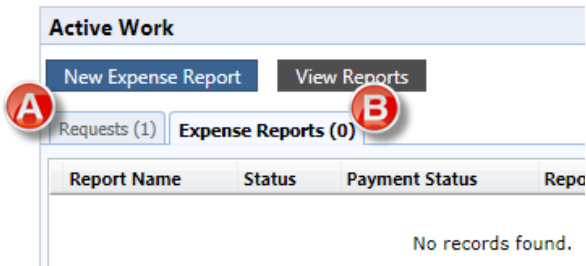
Here at WSU, **Company Info** is really **University Info**. It contains links to the following resources:

GSA Per Diem Rates	Meal allowances while traveling are based on the U.S. General Services Administration's (GSA) published per diem (per day) rates. Rates are set by fiscal year and may change from one fiscal year to the next. This link displays the GSA's Per Diem Rates for the current fiscal year.
Foreign GSA Per Diem Rates	Clicking this link will display the Department of Defense, Defense Travel Management Office, Per Diem Rates Query. Use the Outside CONUS (Continental United States) side of the Query screen to locate the per diem rate for the country you are traveling to.
TravelWayne Website	Clicking this link displays WSU's TravelWayne website.
Expense Types & Account Code Listings	Clicking this link displays WSU's Expense Type Listing. Here you will find common travel expenses and their associated account codes.
Foreign Meal Per Diem Meal Breakdown	Clicking this link displays the U.S. Department of State, My State Department, Appendix B, Chapter 301-Federal Travel Regulations, Allocation of M&IE (Meals & Incidental Expenses) rate to be used in making deductions from your M&IE while traveling in foreign areas.
Enroll Now For The Emerald Club	Clicking this link displays National Car Rental's website to enroll in their Emerald Club to make your car rental faster and easier.
JP Morgan Chase Travel Card Application	Clicking this link will open an application for a JP Morgan Chase Travel Card. This is the WSU Travel Card for travel expense billing.

7 Active Work

Active Work

Active Work has two tabs: Requests and Expense Reports.



- A. With **Requests** selected, you will have two options: New Request or View Requests. If you choose, you can create a new travel request from here (or click on the **Request** tab on the Tab Bar).
- B. With **Expense Reports** selected, your two options are: New Expense Report or View Reports. If you choose, you can create a new expense report from here (or click on the **Expense** tab on the Tab Bar).

8

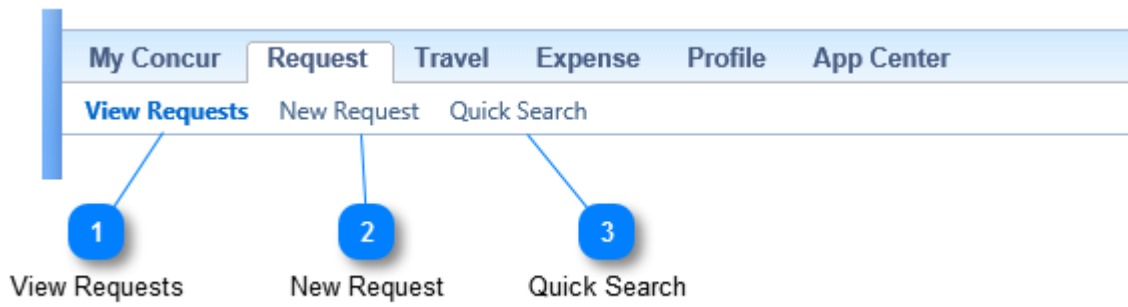
Trip List

Trip List

Contains a list of your trip itineraries.

Trip List	
Add new itinerary manually	
Trip Name/Description	Status
IROS Conference Attend IROS Conference in Chicago	Confirmed

Request Tab



This tab works with Travel Requests.

1 View Requests

[View Requests](#)

To review all active travel requests, click this option.

Active Requests (6)

[Delete Request](#) [Copy Request](#) [Close/Inactivate Request](#)

Request Name	Begins With	Go	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remainin...	Action
<input type="checkbox"/>			YETI Conference	3YVU	Not Submitted	10/12/2014 10/18/2014		\$3,107.00	\$0.00	\$0.00	
<input type="checkbox"/>			IROS2 Conference	3YVW	Approved	09/21/2014 09/27/2014	08/24/2014	\$3,107.00	\$3,107.00	\$3,107.00	Expense

2 New Request

[New Request](#)

To create a New Travel Request, click this option.

Request [Cancel](#) [Save](#) [Print / Email](#) [Delete Request](#) [Submit Request](#)

Trip Title (Short Description): Status: Not Submitted

Request Header | Segments | Approval Flow | Audit Trail

Destination: Travel Type: Trip Title (Short Description): Business Purpose: Date of Departure:

Date of Return: Index: Trip Detailed Description: Student Travel Award?: Guest?

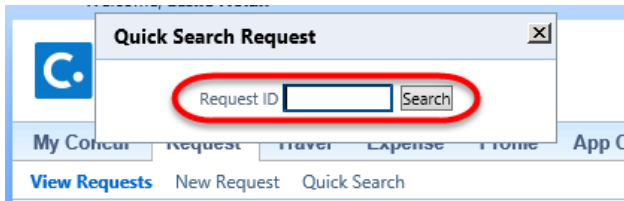
Student? Accompanied By: Comment:

3

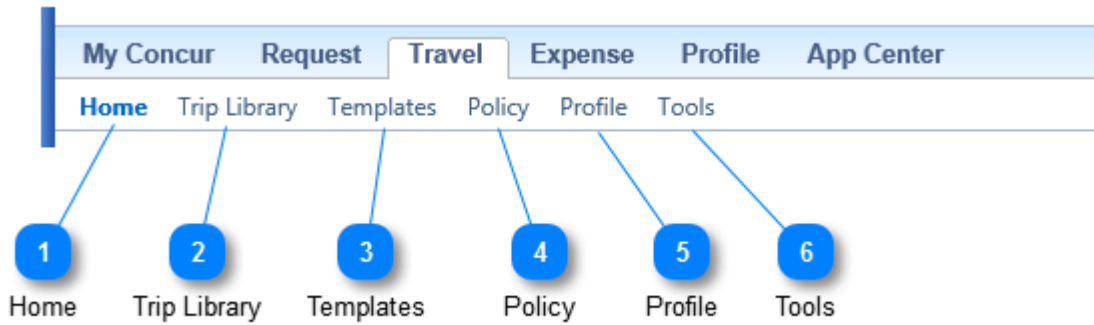
Quick Search

Quick Search

For individuals who travel frequently and may have a lengthy list of active travel requests, clicking this option will display a **Search** function for finding travel requests by **Request ID**.



Travel Tab



<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 Home

This option is a pared-down version of the **My Concur** tab with less functionality.

Company Notes | Travel Map | Upcoming Trips

Welcome, Wayne State Traveler.

This is the state-of-the-art travel and expense system, Concur. Book your travel, print receipts and create expense reports all within one system.

Are you new to the system? You may want to view a tutorial series created to help in booking travel. Training and other useful information can be found on your travel hub at www.conlintravelhub.com/ws

For Travel Assistance:

- For agent assistance with an existing travel reservation, please call: 1-877-654-2179.
- For technical assistance, please call: 1-888-387-3536 or email eservices@conlintravel.com from 8:00AM - 5:30 PM Eastern time.

For Expense System Assistance:

- Email: TravelWayne@Wayne.edu
- Phone: 577-TRIP (8747)


2 Trip Library

Trip Library

Manage trip details.

Search value Dates To Use: Booking Dates Travel Dates Date Range: Include withdrawn trips

No trips meet your search criteria.

 **Manage your trip details in one place.**

3 Templates

Templates

If you travel to the same locations frequently and incur similar travel expenses, you can create travel request templates to simplify your travel management.

You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.

Personal Travel Templates -- Leslie Nolan [+ Add New Template](#)

Template Name	Created by	Description
No records found.		

Company Travel Templates

Template Name	Created by	Description
No records found.		

4 Policy

Policy

Travel rules embedded in Concur based on WSU Travel Policy.

https://www.concursolutions.com/twPopup/travel_rules_popup.asp

Travel Policy for: Wayne State University

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 Departure Country is Algeria, Ghana, Guinea, Kazakhstan, South Africa or Flight Arrival Country is Algeria, Ghana, Guinea, Kazakhstan or Flight connects in country Algeria, Ghana, Guinea, Kazakhstan - Show, but Do Not Allow
- Flight is booked less than 4 hours in advance - Show, but Do Not Allow

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

- 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.

5

Profile

Profile

This option redirects you to the **Profile** tab.




My Concur	Request	Travel	Expense	Profile	App Center				
Personal Information System Settings Mobile Registration									
My Profile									
Jump To:		<input type="text" value="Personal Information"/>	<input type="button" value="Choose"/>						
Disabled fields (gray) cannot be changed. If there are errors in these f									
Fields marked Required! must be completed to save your profile									
<table border="1"> <tr> <td>Your Information</td> <td></td> </tr> <tr> <td>Personal Information</td> <td></td> </tr> </table>						Your Information		Personal Information	
Your Information									
Personal Information									

6

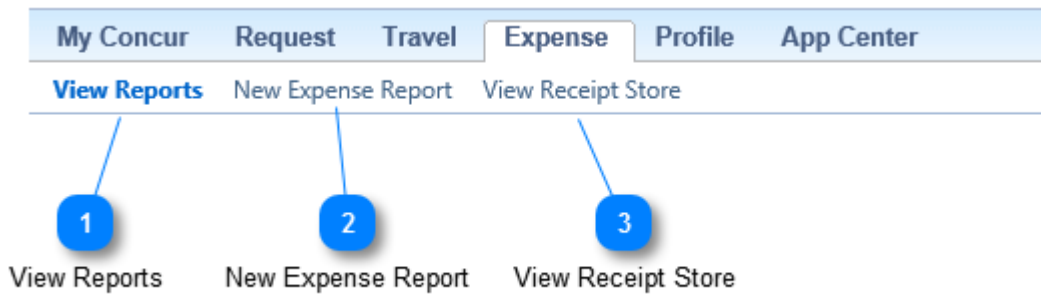
Tools

Tools

This option displays links to travel tools.

	Travel Tools			
	Travel Maps	Weather	Currency Converter	
	International Travel			
	U.S. Passport Services	Travel Warnings	Foreign Entry Info	
	CDC Traveler's Health			
	General Information			
	Tourist Information	Destination Information	World Airport Guide	
	The World Clock - Time Zones			

Expense Tab



This tab provides functions for working with **Expense Reports**.

1 View Reports

[View Reports](#)

This option displays a list of all active reports.

Expense Report List

[Delete Report](#) [Copy Report](#)

Active Reports

View

<input type="checkbox"/>	Report Name	Comments	Status	Payment Status	Report Date	Total	Request...
<input type="checkbox"/>	IROS3 Conference Attend International Conference on Intelligent R		Not Submitted	Not Paid	08/25/2014	\$3,304.05	

2 New Expense Report

[New Expense Report](#)

This option open a form for creating a new expense report.

Create a New Expense Report

Report Header

Destination Travel Type Trip Title (Short Description) Business Purpose

Date of Departure Date of Return

Travel Request ID Number Index Trip Detailed Description Student Travel Award

Guest? Student? Accompanied By: Report Date

Comment Dept ID Address City

State/Province Country Zip/Postal Code

MI US 48152

Requests

[Add](#) [Remove](#)

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

[Next >>](#) [Cancel](#)

3

View Receipt Store

View Receipt Store

The Receipt Store is a "vault" of travel expense receipts that have been faxed, uploaded, or received electronically and are available to be attached to expense reports.

Receipt Store Refresh Upload

This page shows all of the available receipts within Receipt Store and allows you to upload additional receipts.
 If you have Smart Receipts available you can add them to a new or existing expense report.
 To attach receipt images to expense line items please visit Receipt Store within an expense report.

Add Smart Receipts To: Add Selected

Email your receipt images to the Receipt Store: receipts@concur.com
[Verify My Email](#)

Supported_Configurations_for_Co Facing (1).pdf

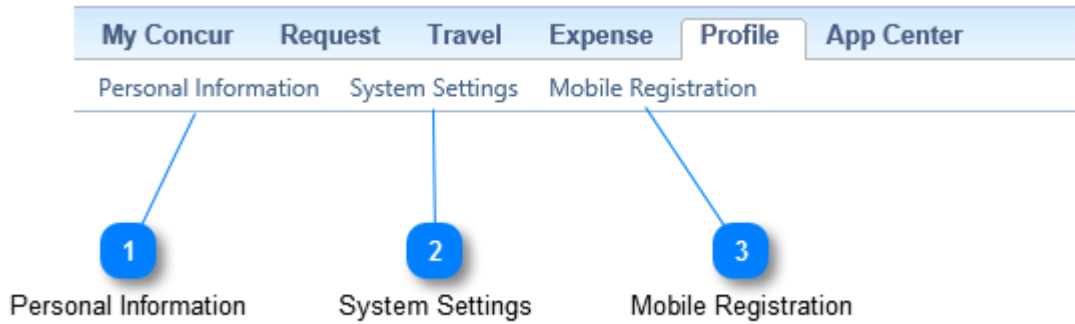
Cafe Monte 07/26/2012 \$45.76

U.S. Airways 07/19/2012 \$323.20

Embassy Suites 11/03/2012 \$553.58

Copy of mileage form.pdf

Profile Tab



This tab allows you to verify and customize your travel profile. The following are the elements of your travel profile:

- Your Information (Personal)
- Travel Settings (Travel Preferences)
- Request Settings (Travel Requests)
- Expense Settings (Expense Reports)
- Other Settings (System Settings, E-Receipt Activation, etc.)

1

Personal Information

Personal Information


This option displays the Settings page where you can verify and change your travel information.

My Profile

Jump To: Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** must be completed to save your profile.

[Change Picture](#) 

Important Note
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 will be presenting at the airport. Due to increased 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]	Suffix
<input type="text"/>	Leslie	<input type="text"/>	<input type="text"/>	Nolan	<input type="text"/>
<input type="checkbox"/> No Middle Name					

Company Information

Employee ID:

Manager: Employee Position/Title:

Work Address [Go to top](#)

Company Name: Assigned Location:

Street:

Address same as assigned location

City: State/Province/Region: Postal Code: Country:

2

System Settings

System Settings

By clicking this option, you can verify and edit default systems (Concur) settings.

<p>Regional Settings and Language</p> <p>Default Language English (United States) ▼</p> <p>Number Format 1,000.00 ▼</p> <p>Placement of Currency Symbol Before the amount ▼</p> <p>Negative Number Format -100 ▼</p> <p>Negative Currency Format -100 ▼</p> <p>mile/km mile ▼</p> <p>Date Format mm/dd/yyyy ▼</p> <p>Time Format h:mm AM/PM ▼</p> <p>Hour/Minute Separator : ▼ 08/25/2014 12:32 pm</p> <p>Time zone (local time) (UTC-05:00) Eastern Time (US & Canada) ▼</p> <p>Email Notifications</p> <p><input checked="" type="checkbox"/> Send an email every time something is put in or removed from my approval queue</p> <p><input checked="" type="checkbox"/> Send a daily summary of items in my queue</p> <p><input checked="" type="checkbox"/> Let me know when one of my requests is approved or denied</p> <p><input checked="" type="checkbox"/> Send Confirmation Emails ?</p> <p><input checked="" type="checkbox"/> Send Trip-on-Hold Reminder Emails ?</p> <p><input checked="" type="checkbox"/> Send Ticketed Travel Reminder Email ?</p> <p><input checked="" type="checkbox"/> Send Cancellation Emails ?</p>	<p>Calendar Settings</p> <p>Start week on Sunday ▼</p> <p>Start Day View At 08:00 am ▼</p> <p>End Day View At 08:00 pm ▼</p> <p>Default View month ▼</p> <p>Other Preferences</p> <p>Home Page ▼</p> <p>Rows per page 25 ▼</p> <p>Other Settings</p> <p><input type="checkbox"/> Run in Concur Accessibility Mode ?</p>
<p>Save Reset Cancel</p>	

3

Mobile Registration

Mobile Registration

Activation and download information about Concur Mobile App.

Capture your receipts and manage your travel on the go!



[Learn More](#)

Set up PIN for mobile

To log in to Concur on your mobile device or Concur Connect application, you must enter your User Name and a PIN.

Enter a new PIN in the fields below to setup a new one.

Concur Username: ar0696@wayne.edu

Create PIN:

PIN may be letters, numbers and special characters such as !, \$, or # but no spaces

Retype PIN:

[Set PIN](#)

Download the app



Or send a link to your device - enter your email address or mobile phone number (including country code for non-US numbers) and we will send you a link to get the app:

ar0696@wayne.edu [Send Link](#)

App Center Tab

App Center

Connect with services that link with your Concur account. Discover enterprise solutions pre-built to integrate with Concur. Your life just got a whole lot easier.

Apps for me Apps for my business

Ready for fast and easy booking?
Connect your IHG® Rewards Club profile to Concur. Take advantage of negotiated rates at your company's preferred hotels no matter where you book. Bookings instantly load in Concur!

You get the Starpoints, Concur gets the details
Connect your Starwood Preferred Guest® account with Concur, and the stays you book on SPG.com will be added to your Concur account.

A comprehensive list of travel apps for your smart device that are integrated with Concur. Here is a list of app categories:

- Reward Programs
- Mileage Expense Logging & Calculating
- Manage Receipts & Expense Reports Electronically
- Create Travel Plans
- Electronically Send Gift Cards
- Language & Cultural Guides
- Travel Updates & Instant Travel Alternatives
- Social Seating & Booking
- Venue Recommendations

Before downloading any of these apps, please review the accompanying information. Some of these apps require a service fee or subscription.

Section 2: Preparing To Travel



Before planning your first trip with TravelWayne (Concur), there are two actions you must complete and several that are optional but recommended in order to use the full potential of the TravelWayne system.

Step 1: **(Required)** Create a user profile in TravelWayne. (see [Create your User Profile](#))

Step 2: (Optional) Apply for an Travel Card. (see [Apply for a Travel Card](#))

Step 3: **(Required)** Talk to you Business Affairs Officer to understand the travel requisition and approval process within your unit.

Step 4: (Recommended) Activate a Triplt Pro subscription/download the app to your smart devices. (see [Activate Triplt Pro Subscription](#))

Step 5: (Recommended) Activate and download Concur Mobile Application to your smart devices.

Step 6: (Recommended) Register for National Car Rental Emerald Club membership.

Step 7: (Recommended) Activate E-Receipts and Receipt Store.

Review WSU Travel Expense Policy & Procedure

Before you begin planning your university-related travel, it is good practice to review WSU's [Travel Expense Policies and Procedures](#) for employee and non-employee responsibilities related to travel. University policies and procedures are dynamic, in that, they are subject to change. For that reason, links are provided here so that you, the traveler, have access to the current document.

Administrative Policy and Procedure Manual

Travel policies and procedures are located in the **Administrative Policy and Procedure Manual**. Section 7.0 of the manual contains the Travel Expense Policy and Procedure. Here is a list of the subsections:

Policy	Topics
7.1 Travel Expense Policies and Procedures	<ul style="list-style-type: none"> • Purpose of the travel policy • Responsibilities of the (a) traveler/employee, (b) authorizer/approver, and (c) Fiscal Operations/ Disbursements • Travel agency services • Travel card program • Travel expense report supporting documentation (<i>table identifying expenses that require documentation and acceptable types of documentation</i>)
7.2 Travel Expenses	
7.2.1 Airfare	<ul style="list-style-type: none"> • General (airfare) procedures • Travel classes (<i>travel profile</i>) • Sponsored travel • Conference designated airline • Airline Clubs • Accounting for unused airline tickets
7.2.2 Lodging	<ul style="list-style-type: none"> • Actual costs paid • Guidelines for expensing internet charges, meals, etc. charged to hotel room • Guidelines for choosing hotel accommodations • Guidelines for "no show" charges and "free room" reimbursement
7.2.3 Car Rental	<ul style="list-style-type: none"> • Guidelines for individual and group car rentals • Car rental agreement insurance
7.2.4 Meals	<ul style="list-style-type: none"> • Guidelines for when meals are expensed • Use of General Services Administration per diem rates for meal reimbursement • Required meal adjustments when applying per diem rates • Guidelines for expensing business entertainment and meals while traveling

[7.2.5 Conference & Professional Meetings](#)

- Submission of conference registration and agenda or meeting schedule
- Host provided meals
- Optional recreation events

[7.2.6 Travel Insurance](#)

- WSU Travel Accident Insurance Policy

[7.2.7 Taxi and Other Local Transportation](#)

- Guidelines for reimbursement of ground transportation

[7.2.8 Personal Automobile](#)

- Use of traveler's personal automobile for official University business
- Business justification for driving vs. flying
- Guidelines for expensing electronic toll passes
- Determining mileage expense
- Guidelines for qualifying for mileage expense
- Examples for calculating mileage

[7.2.9 University Vehicle](#)

- Guidelines for reimbursable expenses
- Guidelines for non-reimbursable expenses

[7.2.10 Telephone & Internet Charges](#)

- Guidelines for expensing telephone charges
- Guidelines for expensing internet charges

[7.2.11 Miscellaneous Expenses](#)

- Guidelines for expensing laundry, cleaning and pressing clothing
- Guidelines for expensing tips for services rendered
- Guidelines for expensing other business related charges, e.g. reproduction, office supplies, etc.

[7.3 Spouse/Partner Travel](#)

- Guidelines for expensing spouse/partner expenses while traveling with an authorized WSU employee

[7.4 Employee Recruitment](#)

- Guidelines for reimbursement of travel related expenses, e.g. transportation, hotel, meals, etc., prospective employees and their families
- Prospective employee travel expenses vs. employee moving expenses

[7.5 International Travel](#)

- Guidelines for expensing international travel
- Guidelines for currency conversions

[7.6 Travel Advances](#)

- Policy for travel advances

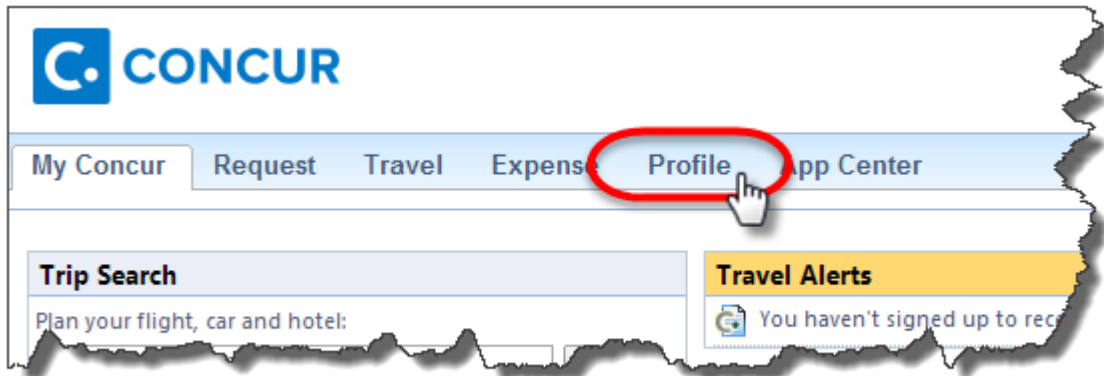
[7.7 Submitting Travel Expense Reports](#)

- Policy for submitting travel expense reports

[7.8 Approvals](#)

- Policy for approving travel expense reports
- Policy for exceptions to the travel policy

Update Your Travel Profile



Before you use **TravelWayne** for the first time, update your profile. You must save your profile before you first attempt to book a trip in **TravelWayne**. To update your profile, you will click the **Profile** tab on the toolbar.

Note: If you are a travel arranger (arrange travel for another WSU traveler, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the Profile page).

When the contents of the tab displays, you will see the following categories of your travel profile in the **My Profile** navigation panel on the left-hand side of the screen. Within each of these categories, there are a number of links to specific sections of your travel profile.

- Your Information
- Travel Settings
- Request Settings (Travel Request settings)
- Expense Settings (Expense Report settings)
- Other Settings

Note: In the center of the Profile tab, you can see additional links to sections of your travel profile. These links are identical to the links in the navigation panel; however, they are included here because they are the most commonly used.

When setting up your user profile, you are not required to complete ALL the sections of your travel profile. However, there are four sections that are required steps and two that are optional steps.

1. Update your personal information
2. Setup a travel arranger or assistant. (if someone else will be making your travel arrangements)
3. Setup your credit card(s).
4. Setup your bank information.
5. (Optional) register for Concur mobile apps.
6. (Optional) activate E-Receipts.

Each step will be described in detail in the following topics. This job aid assumes you have already logged into **TravelWayne**.

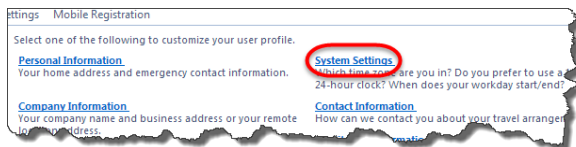
Changing Your Time Zone, Date Format or Language

Regional Settings & Language Calendar Settings

1 2

3 Email Notifications

On the Profile main page, click **System Settings**.



1 Regional Settings & Language

Regional Settings and Language

Default Language

English (United States) ▼

Number Format

1,000.00 ▼

Placement of Currency Symbol

Before the amount ▼

Negative Number Format

-100 ▼

Time Format

h:mm AM/PM ▼

Hour/Minute Separator

: ▼ 06/20/2014 11:37 am

Time zone (local time)

(UTC-05:00) Eastern Time (US & Canada) ▼

Email Notifications

Send an email every time something is put in or removed from my queue

Send a daily summary of items in my queue

Send Confirmation Emails

Send Trip-on-Hold Reminders

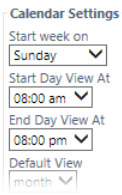
Send Ticketed Travel Reminder Email

Send Cancellation Emails

Regional Settings affect the way the values will be displayed in your web browser while logged into TravelWayne. You can change the values to suit your preferences.

2

Calendar Settings



Calendar Settings

Start week on
Sunday

Start Day View At
08:00 am

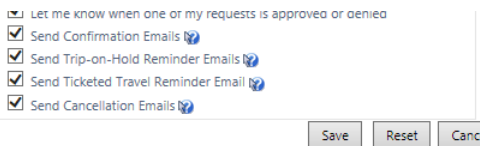
End Day View At
08:00 pm

Default View
month

Calendar Settings affect the way dates and times are displayed in your web browser while logged into TravelWayne. You can change the values to suit your preferences.

3

Email Notifications



Let me know when one of my requests is approved or denied

Send Confirmation Emails

Send Trip-on-Hold Reminder Emails

Send Ticketed Travel Reminder Email

Send Cancellation Emails

Save Reset Cancel

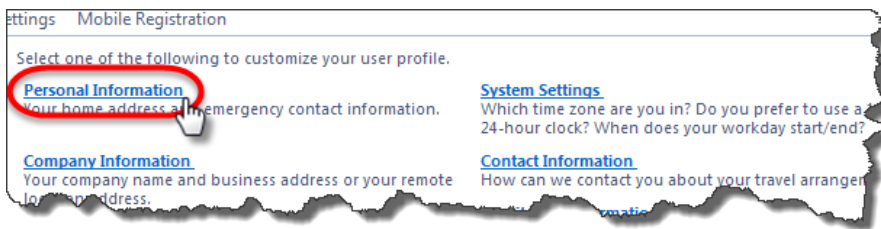
Email Notifications give you control over whether or not you receive specific emails regarding your travel through TravelWayne. You can turn an email notification off by clicking the check box next to the notification to unselect the check box.

Updating Your Personal Information

Before you attempt to create your first travel request, you **MUST** update your personal information. Throughout the **Personal Information** section of TravelWayne, all required fields are identified with the word **[Required]** to the right of the field name.

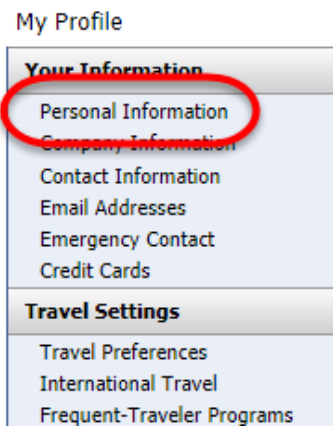
To access the **Personal Information** section from the **My Concur** tab, follow these steps:

1. From the **Profile** tab main page, click the Personal Information link.



To access Personal Information from the Systems Settings screen, follow these steps:

1. Locate the navigation panel along the left-hand side of your screen.
2. Click **Personal Information** under the **Your Information** section.



Enter Your Personal Information

Identification/Ticket Name Match

1

2

3

4

5

Travel Expense Profile App Center

System Settings Mobile Registration

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** must be completed to save your profile.

Important Note
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 will be presenting at the airport. Due to increased 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]** Suffix

Company Information

Employee ID
ar0696

Manager Employee Position/Title
Kimberly Eims

Save

Work Address [Go to top](#)

Company Name Assigned Location
Wayne State University Please choose a company location.

Street Address same as assigned location

City State/Province/Region Postal Code

Country

Save

Home Address

Street


City State/Province/Region Postal Code

Country
United States of America

Save

This screen contains several **Save** buttons. Clicking **Save** before all required fields have been completed will cause an error event and you will be directed to complete all required fields before clicking **Save**.

1 Identification/Ticket Name Match

Important Note
 **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 will be presenting at the airport. Due to increased 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]	Suffix
<input type="text"/>	<input type="text" value="Leslie"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Nolan"/>	<input type="text"/>
<input type="checkbox"/> No Middle Name					

Critical: Your name as displayed in this section is how it will be printed on your airline ticket. Your name on the airline ticket **MUST** match your name as it appears on your photo identification (e.g. driver's license) you will present to TSA at airport security. If the two names **DO NOT** match, you run the risk of being turned away at airport security.

If the names do not match, change your name as it appears in TravelWayne to match your name as it appears on your photo identification.

2 Company Information

Company Information

Employee ID	
<input type="text" value="ar0696"/>	
Manager	Employee Position/Title
<input type="text" value="Kimberly Elms"/>	<input type="text"/>

For our purposes, **Company Information** is **University Information**. In the **Employee ID** field, verify your WSU Access ID. The name displayed in the **Manager** field will be approving your travel request and your expense report.

If the name that appears in the field is not your manager, but higher-level authorizer, you will have an opportunity to add your manager to the approval queue when creating your travel request.

3 Work Address

Work Address [Go to top](#)

Company Name		Assigned Location	
<input type="text" value="Wayne State University"/>		<input type="text" value="Please choose a company location."/>	
Street		<input type="checkbox"/> Address same as assigned location	
<input type="text"/>		<input type="text"/>	
City	State/Province/Region	Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Country			
<input type="text"/>			

Adding your **Work Address** is optional.

4 Home Address

Home Address		
Street		
<input type="text"/>		
City	State/Province/Region	Postal Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country		
<input type="text" value="United States of America"/>		

Adding your Home Address is optional.

5 Save Button

Click **Save** to save **Personal Information** updates to your profile. Note: Once all required fields are complete, you can click ANY Save button on the screen.

Enter Your Contact Information

The screenshot shows a 'Contact Information' form with the following fields and buttons:

- 1** Work Phone [Required]**
- 2** Home Phone [Required]**
- 3** Mobile Phone [Required]**
- 4** Send Text Message
- 5** Save Button

Other fields include: Work Extension, Work Fax, 2nd Work Phone/Remote Office, Pager, Other Phone, and a dropdown menu for Mobile Phone. A note at the bottom of the form states: ****You must specify either a home phone or a work phone.**

There are three phone fields in this section. Each one has a specific purpose:

- Work Phone - Receive calls at work.
- Home Phone - Receive calls at home.
- Mobile Phone - Receive text messages

However, you can enter your main work phone into all three fields.

1 Work Phone

Work Phone [Required]**

Enter your main work phone number.

2 Home Phone

Home Phone [Required]**

As displayed by the note at the bottom of this section, you are only required to put your work phone or your home phone. In the event you are using a Concur travel agent, providing a home phone number will allow the agent to contact you at home.

3 Mobile Phone

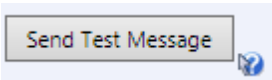
Mobile Phone [Required]**

Send Test Message

You can include your mobile phone number to have text messages automatically sent to you.

4

Send Text Message



Click send to have a test text message sent to your mobile phone.

5

Save Button



Click **Save** to save **Contact** updates to your profile.

Verify Your Email Address

On Page Instructions

Add Email Address

1

2

3

Edit Email Address

Verifying your email address ensures you can take advantage of several functions within TravelWayne.

1 On Page Instructions

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

Clicking the links will expand the instructions for each of the issues presented in the section.

How do I add an email address?

To take advantage of the Travel Arranger or Delegate function, you must include their email address(es) in this list. Click the link **How do I add an email address?** and follow the instructions that display.

Travel Arrangers/Delegates

- The Arranger can send the trip email to plans@concur.com, and include the traveler's verified email address in the Subject line of the email.
- The Delegate can send the receipt email to receipts@concur.com, and include the user's verified email address in the Subject line of the email.

Why should I verify my email address?


- Information forwarded by your email address can be associated with your Concur account.
- Forward travel plans to plans@concur.com to have reservations added to your trips.
- Forward your receipt images to receipts@concur.com to have your receipts uploaded into your Receipt Store.

How do I verify my email address?

1. Click the **Verify** link.

Email 2	Verification Status		Contact?
traveler@wayne.edu	Not Verified	Verify	Yes

2. Check your email inbox for the verification email sent by Concur.



You have requested that an email address in your Concur profile be verified. The next step is to log in to Concur and navigate to your Profile - Email Addresses section. Copy the verification code listed below and paste it into the adjoining field, as shown here:
 Verification Code: 25CSX2258DRRP444F2NB
 Example

myemail2@company.com Check E-Mail for Code [Resend](#) | [Cancel](#)

Enter Code OK

You are now ready to start sending emails to Concur.

If successful, then you are ready to start forwarding trip E-Mails to Concur.

For additional support, contact your Travel Administrator or Helpdesk.
 Cordially,
 Your Concur Team.

3. Copy the code contained in the body of the verification email and paste it into the **Enter Code** field in Concur.
4. Click **OK** to submit the code and complete the verification.

Email 2	Verification Status		Contact?
traveler@wayne.edu	Check email for code	Resend Cancel	Yes
	Enter Code	<input type="text" value="25CSX2258DRRP444F2NB"/> OK	

2

Add Email Address

[+ Add an email address](#)

1. To add an email to your **Email Addresses**, click the **Add an email address** link. When the **Enter Email Address** field displays, enter the email address and click **OK**.

Enter email address	Contact for Travel Notifications?	OK Cancel
<input type="text" value="WSU.Traveler@wayne.edu"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	

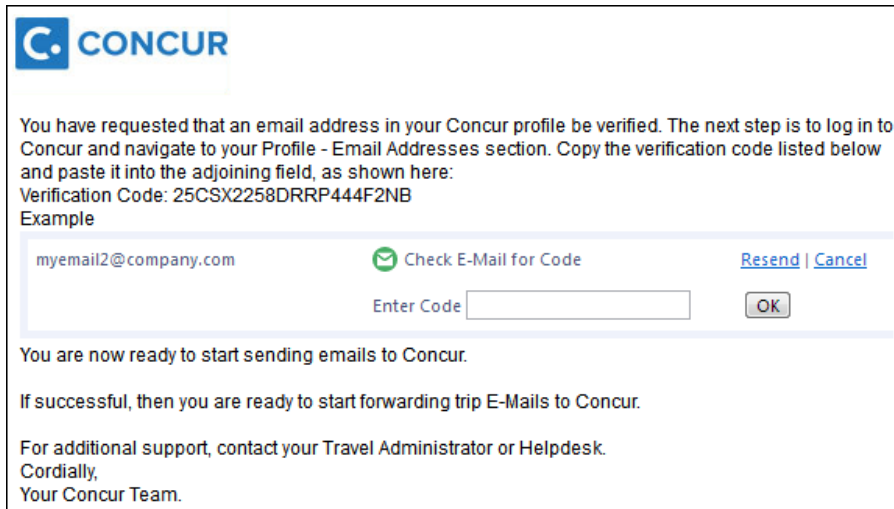
2. The page will be refreshed, and the new email address will appear in the Email column. The Verification Status will be Not Verified.

Email 2	Verification Status		Contact?
traveler@wayne.edu	Not Verified	Verify	Yes

3. To verify the email address is valid, click the **Verify** link.

Email 2	Verification Status		Contact?
traveler@wayne.edu	Not Verified	Verify	Yes

4. Check your email inbox for the verification email sent by Concur.



CONCUR

You have requested that an email address in your Concur profile be verified. The next step is to log in to Concur and navigate to your Profile - Email Addresses section. Copy the verification code listed below and paste it into the adjoining field, as shown here:
 Verification Code: 25CSX2258DRRP444F2NB
 Example

myemail2@company.com [Resend](#) | [Cancel](#)

Enter Code

You are now ready to start sending emails to Concur.

If successful, then you are ready to start forwarding trip E-Mails to Concur.

For additional support, contact your Travel Administrator or Helpdesk.
 Cordially,
 Your Concur Team.

5. Copy the code contained in the body of the verification email and paste it into the **Enter Code** field in Concur. Click **OK** to submit the code and complete the verification.

Email 2	Verification Status	Contact?
myemail2@company.com	<input checked="" type="checkbox"/> Check email for code Resend Cancel	Yes <input type="button" value="edit"/> <input type="button" value="x"/>
	Enter Code <input type="text" value="25CSX2258DRRP444F2NB"/> <input type="button" value="OK"/>	

3

Edit Email Address



To edit an existing email address, click the **Edit** button to the right of the email you want to edit. The email address will display in an edit mode, and you can make changes to the address.

Enter Emergency Contact Information

The screenshot shows the 'Emergency Contact' form with the following fields and callouts:

- 1** points to the **Name** text input field.
- 2** points to the **Relationship** dropdown menu.
- 3** points to the **Street**, **City**, **State/Province/Region**, and **Postal Code** text input fields.
- 4** points to the **Phone** and **Alternate Phone** text input fields.

Additional form elements include a 'Go to top' link, a 'Country' dropdown (set to 'United States of America'), and a checkbox labeled 'Address same as employee'.

In the event of a travel emergency, the Concur support team will need the name, address and phone number of someone other than the traveler.

1 Emergency Contact Name

A close-up of the 'Name' text input field.

Enter the name of the Emergency Contact person.

2 Relationship

A close-up of the 'Relationship' dropdown menu.

Click anywhere in the **Relationship** field to display the drop-down menu. Select the appropriate relationship.

A close-up of the 'Relationship' dropdown menu options:

- Brother
- Parent
- Sister
- Spouse** (highlighted)
- Life Partner
- Other

3 Contact Address

A close-up of the 'Contact Address' fields, including the 'Street', 'City', 'State/Province/Region', and 'Postal Code' text input fields, and the 'Address same as employee' checkbox.

If the address of the emergency contact is the same as the WSU traveler, the address will not display in this area. If the address is different than the WSU traveler, uncheck the box titled **Address same as employee** and enter the contact's address.

4 Contact Phone Number

Phone	Alternate Phone
<input type="text"/>	<input type="text"/>

Enter the contact's phone number and alternate phone number if applicable.

Enter Your Travel Preferences

Discount Travel Rates **1**

Air Travel Preference **2**

Hotel Preferences **3**

Car Rental Preferences **4**

Frequent-Traveler Programs **5**

TSA Secure Flight **6**

Travel Preferences Go to top

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

Air Travel Preferences

Seat: Special Meals: Ticket Delivery:

Preferred Departure Airport: Other Air Travel Preferences:

Medical Alerts:

Hotel Preferences

Room Type: Smoking Preference: Foam pillows Rollaway bed Crib

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: Smoking Preference: Car Transmission:

Message to Vendor:

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs + Add a Program

No programs defined

Southwest Ticket Credits

[+ Add ticket credit](#)

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, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender **[Required]** Male Female Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No. TSA Pre✓ Known Traveler Number

Travel preference is a completely optional area. The advantage of completing this section is to provide a Concur agent with all the information you would like them to consider when assisting you in booking your travel.

1

Discount Travel Rates

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

If you are a member of any of these travel discount rates, check the appropriate box.

2

Air Travel Preference

If you have a preference of seat, meal or ticket delivery, make the appropriate choices here.

Travel Preferences continued

Seat Selection

Click the appropriate option.

Special Meals

Click the appropriate option.

Ticket Delivery

The default entry is "E-ticket when possible" and is not changeable.

Preferred Departure Airport

The screenshot shows two input fields side-by-side. The left field is labeled 'Preferred Departure Airport' and has a globe icon. The right field is labeled 'Other Air Travel Preferences'.

Enter your **Preferred Departure Airport** if desired. You can enter a city name or the 3-letter airport code.

Medical Alerts

The screenshot shows a single text input field with the label 'Medical Alerts' above it.

Enter any medical alerts you may have that you want your air carriers to be aware of.

3

Hotel Preferences

The screenshot shows a form titled 'Hotel Preferences'. It includes several sections:

- Room Type**: A dropdown menu currently set to 'Don't Care'.
- Smoking Preference**: A dropdown menu currently set to 'Don't Care'.
- Message to Vendor**: A text input field.
- Additional Preferences**: Checkboxes for 'Foam pillows', 'Rollaway bed', and 'Crib'.
- I prefer hotel that has:** Checkboxes for 'a gym', 'a pool', 'a restaurant', 'room service', and 'Early Check-in'.
- Accessibility Needs**: Checkboxes for 'Wheelchair access' and 'Blind accessible'.

Select your Hotel Preferences here.

Room Type

The screenshot shows a dropdown menu for 'Room Type'. The current selection is 'Don't Care'. The menu is open, showing the following options: 'Don't Care', 'King', 'Queen', 'Double', 'Twin', 'Single', and 'Disability'.

Click anywhere in the field and select your room type preference.

Smoking Preference

The screenshot shows a dropdown menu for 'Smoking Preference'. The current selection is 'Non-smoking'. The menu is open, showing the following options: 'Non-smoking', 'Don't Care', 'Non-smoking', and 'Smoking'.


Click anywhere in the field and select your smoking preference.

Bedding Options

Foam pillows Rollaway bed Crib

Click the appropriate box to make your selection(s).

Message to Vendor

Message to Vendor 


You can send a short message to Concur indicating any additional requests you may have. This field has a 30-character maximum.

Hotel Preferences

I prefer hotel that has:

a gym a pool a restaurant room service Early Check-in

Accessibility Needs

 Wheelchair access Blind accessible


Click the appropriate box to make your selection(s).

4

Car Rental Preferences

Car Rental Preferences

Car Type	Smoking Preference	Car Transmission
Any Car Class	Don't Care	Automatic

Message to Vendor 

Make your car rental choices here.

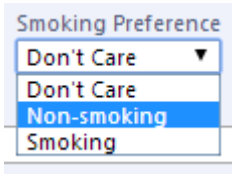
Car Type

Car Type

- Any Car Class
- Mini Car
- Economy Car
- Economy Car Hybrid
- Compact Car
- Compact Car Hybrid
- Intermediate Car
- Intermediate Car Hybrid
- Standard Car
- Standard SUV
- Full-size SUV
- Full-size Pickup
- Specialized Vehicle

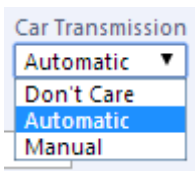
Click anywhere in the field and select your smoking preference.

Smoking Preference

A screenshot of a dropdown menu titled "Smoking Preference". The menu is open, showing four options: "Don't Care" (selected), "Don't Care", "Non-smoking", and "Smoking".

Click anywhere in the field and select your smoking preference.

Car Transmission

A screenshot of a dropdown menu titled "Car Transmission". The menu is open, showing four options: "Automatic" (selected), "Don't Care", "Automatic", and "Manual".

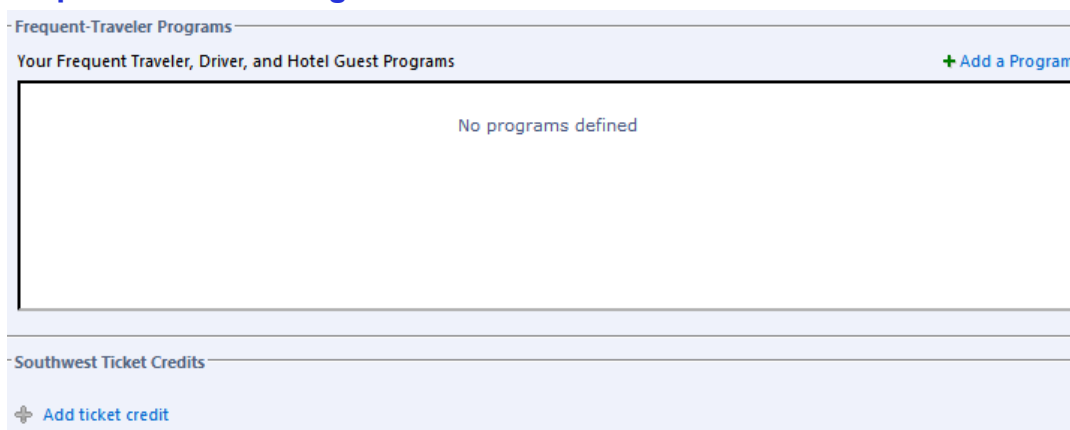
Click anywhere in the field and select your smoking preference from the drop-down menu.

Message to Vendor

A screenshot of a text input field titled "Message to Vendor" with a help icon. The field is empty.

You can send a short message to Concur indicating any additional requests you may have. This field has a 30-character maximum.

5 Frequent-Traveler Programs

A screenshot of the "Frequent-Traveler Programs" interface. The title bar reads "Frequent-Traveler Programs". Below it, the subtitle is "Your Frequent Traveler, Driver, and Hotel Guest Programs" with a "+ Add a Program" link. The main content area is a large empty box with the text "No programs defined" centered. At the bottom, there is a section titled "Southwest Ticket Credits" with a "+ Add ticket credit" link.




Click Add a Program to enter your frequently traveler information.

6

TSA Secure Flight

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, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No.   Known Traveler Number 

Male Female


Gender and Date of Birth are required fields. Your profile will not save if the fields are not completed.

DHS Redress No. (Optional)

DHS Redress No. 

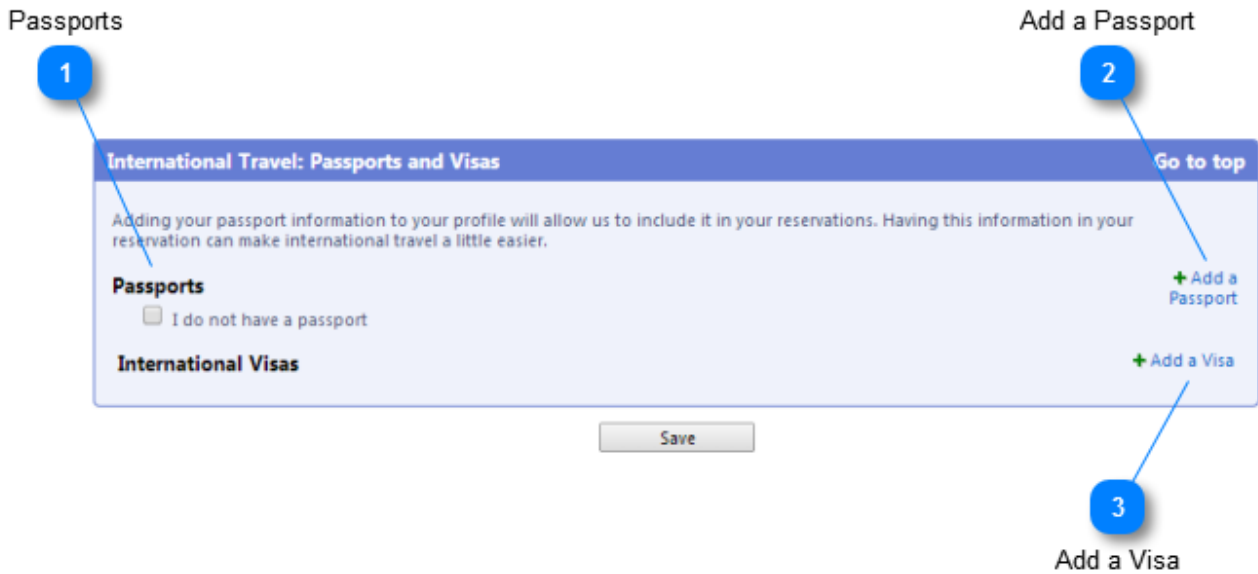
The DHS Redress Number is a unique number that helps TSA eliminate watch list misidentification. If you have a name that is similar to or the same as a name on the current terrorist watch list and have experienced secondary security screening at airports, you can apply for a Redress Number. Click the help icon at the left of the DHS Redress field for additional information.

TSA Pre Known Traveler Number

 Known Traveler Number 

The Known Traveler Number is a unique number assigned to "known travelers" from whom the Federal Government has already conducted a threat assessment and has determined do not pose a security threat. For more information, click the help icon to the left of the field.

International Travel: Passports and Visas



Including your Passport or Visa numbers included in your profile allows Concur to include them in your reservations. This can help make your international travel a little easier.

1 Passports

Passports

I do not have a passport

If you do not have a passport, check the box.

2 Add a Passport

+ Add a
Passport

If you have a Passport and would like to add the number to your profile, click the Add a Passport link.

3 Add a Visa

+ Add a Visa

If you have a Visa and would like to add the number to your profile, click the Add a Passport link.

Verify Your Travel Assistant or Travel Arranger

Pre-assigned Travel Assistant

Refuse Self Assigning Assistants

Add an Assistant

Assistants and Travel Arrangers essentially have the same role in the process. They can:

- View and modify your profile
- Book travel and trips for you (optional)

1 Pre-assigned Travel Assistant

If your unit has programmatically pre-assigned Travel Assistants, verify the name of your Assistant.

2 Refuse Self Assigning Assistants

Your unit may have one or more assigned Travel Assistants. If you want to restrict these assistants from assigning themselves as your Travel Assistant, check the box.

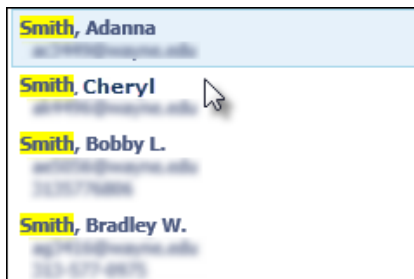
3 Add an Assistant

If your unit does not have pre-assigned Travel Assistants or you prefer to choose someone who has not been pre-assigned, you can manually add them as your assistant. However, this person must have an active Travel account. To manually add a travel assistant, follow these instructions:

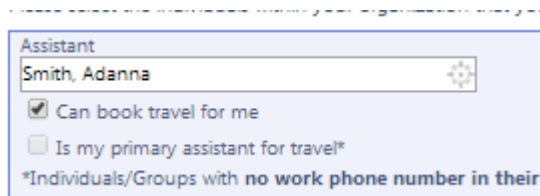
1. Click the Add an Assistant link to open the Add an Assistant dialog box.
2. When the Add an Assistant dialog box displays, click anywhere in the Assistant field.

Hint: When searching for an Assistant, enter the LastName,FirstName without a space after the comma. For example: Smith,Adanna.

3. As you type, an alphabetic list of employees with travel accounts will display. As you continue to type, the search results will begin to narrow. When the name of your assistant is displayed, click it to select it.



4. With the name of your Assistant displayed in the **Assistant** box, click the check box for **Can book travel for me**. Click **Save**.



Setting Up Credit Cards

Add a Credit Card

1

2 Display Name

3 Your Name

4 Card Type

5 Credit Card Number & Expiration Date

6 Default Credit Card

7 Billing Address

Go to top

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

+ Add a Credit Card

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction. **All fields are required.**

Display Name (e.g., My Corporate Card) Your name as it appears on this card

Card Type Credit Card Number Expiration Date

Use this card as the default card for:

Plane Tickets Rail Tickets Car Rentals Hotel Reservations Taxi

Billing Address: Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address **must** be the address where the bills for this card are **currently** delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. **Your credit card may be declined if your billing address is inaccurate.**

Note: Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City State Zip/Postal Code

Country

If you have not obtained a JP Morgan Chase Travel Card (Wayne Travel Card), return to this section to add it to your profile after you have done so. Wayne Travel card are not to be used for personal expenditures. To cover personal expenses while traveling you can add a personal credit card to your profile. To obtain a Wayne Travel Card, see the section for [Apply for a Travel Card](#).

1 Add a Credit Card

2 Display Name

Display Name (e.g., My Corporate Card)

If applicable, enter the display name as it appears on the card.

3 Your Name

Credit Card Number Expiration Date

Enter your name as it appears on the card.

4 Card Type

 A screenshot of a web form showing a dropdown menu for 'Card Type'. The dropdown is currently closed, showing a small downward arrow. To the right of the dropdown is a small 'Cri' label.

Click anywhere in this field to access the drop-down menu.

 A screenshot of the 'Card Type' dropdown menu with the following options: American Express, Discover, MasterCard, VISA, UATP, Diners Club (Outside North America), and JCB International. A mouse cursor is pointing at the 'MasterCard' option.

Select the **Card Type** from the drop-down list.

5 Credit Card Number & Expiration Date

 A screenshot of two input fields: 'Credit Card Number' and 'Expiration Date'. The 'Expiration Date' field is split into two parts: a month dropdown showing '7' and a year dropdown showing '2014'.

Enter the Credit Card Number and Expiration Date.

6 Default Credit Card

 A screenshot of a section titled 'Use this card as the default card for:'. Below the title are five checkboxes: 'Plane Tickets', 'Rail Tickets', 'Car Rentals', 'Hotel Reservations', and 'Taxi'. All checkboxes are currently unchecked.

You can choose to use the card you are entering as the default card for these specified items. Click the appropriate check box to use this card as the default card for these types of purchases.

7 Billing Address

 A screenshot of a 'Billing Address' form. It includes fields for 'Street', 'City', 'State' (a dropdown menu currently showing 'None Selected'), 'Country' (a dropdown menu showing 'United States of America'), and 'Zip/Postal Code'. A tip box on the right says: 'Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.'

For personal credit cards, use the billing address associated with this credit card. If you are adding a Wayne Travel card, use JP Morgan Chase address.

Setting Up Bank Information

Routing Number Bank Account Number Retype Bank Account Number

1 2 3

Bank Information

Bank Country: UNITED STATES Bank Currency: US, Dollar

Routing Number: _____ Bank Account Number: _____ Re-Type Bank Account Number: _____

Bank Name: _____ Branch Location: _____ Account Type: Checking Status: _____ Active: Yes

Save

When setting up your bank information, there are only three required fields: Routing Number, Bank Account Number, and Account Type. The following illustration shows where the routing and bank account numbers are located on one of your checks.

John Q. Public
1358 Main St.
Somertown, OH 98765

_____, 20__ 1001

Pay to the order of _____

_____ Dollars

Bank of Somertown

⑆ 234123987 ⑆ 001234567891 ⑆ 1001

Bank Routing Number Bank Account Number Check Number (Do not use)

1 Routing Number

Routing Number

Enter the **Routing Number** here.

2 Bank Account Number

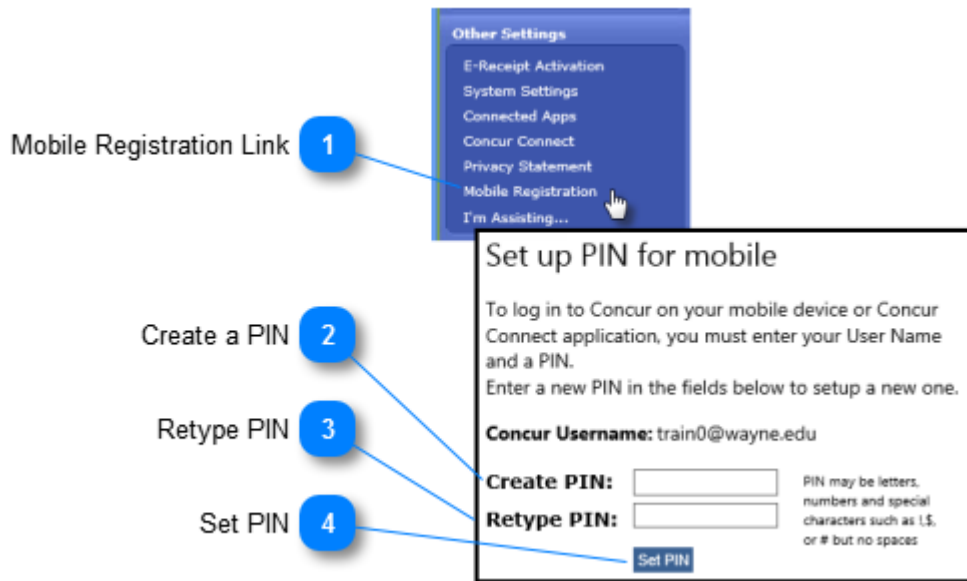
Bank Account Number

Enter your **Bank Account Number** here.

3 Retype Bank Account Number

Re-Type Bank Account Number

Retype your **Bank Account Number** here to verify accuracy.

(Optional) Registering for Concur Mobile Apps

<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 Mobile Registration Link

Mobile Registration
I'm Assisting...

Along the left-hand side of the screen, under **Other Settings**, click **Mobile Registration**.

2 Create a PIN

Create PIN:

Enter a PIN number. Note: Follow the instructions to the right of the PIN field.

3 Retype PIN

Retype PIN:

Retype your PIN to confirm it.

4 Set PIN

Set PIN

Click Set PIN to set and save the PIN.

(Optional) Download the Mobile App

1

Apple

If you have an iPhone or Apple mobile device, this link will redirect you to the **Apple App Store** where you can download the app to your iPhone or Apple mobile device.

2

Android

If you have an Android Smartphone or device, clicking this link will redirect you to **Google Play Store** where you can download the app to your Android Smartphone or mobile device.

3

Blackberry

If you have a BlueBerry Smartphone, clicking this link will redirect you to **BlueBerry App World** where you can download the app to your BlueBerry Smartphone.

4

Windows

If you have an Windows Smartphone or device, clicking this link will redirect you to **Windows Store** where you can download the app to your Windows Smartphone or mobile device.

5

Send Link

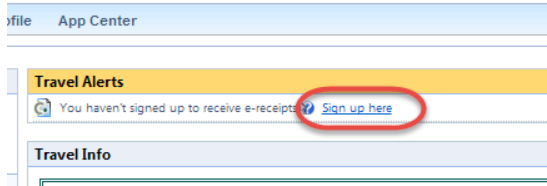
[Send Link](#)

You can also enter your email address or mobile phone number and Concur will send you a link to get the app.

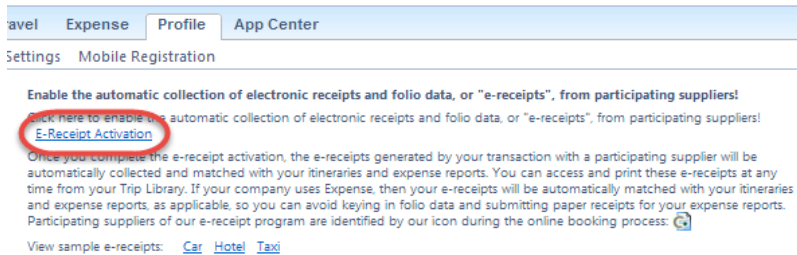
(Optional) Activating E-Receipts

E-receipts are an electronic version of the paper receipts you receive when you purchase travel related items. E-receipts can be sent directly to Concur: receipts that are emailed to you, vendors who provide e-receipts, and receipts photographed through your smart device using Expensit. This saves time and effort from having to image your receipts when you return from your trip. To enable E-receipts from you Concur profile. First log into Concur, then follow these instructions:

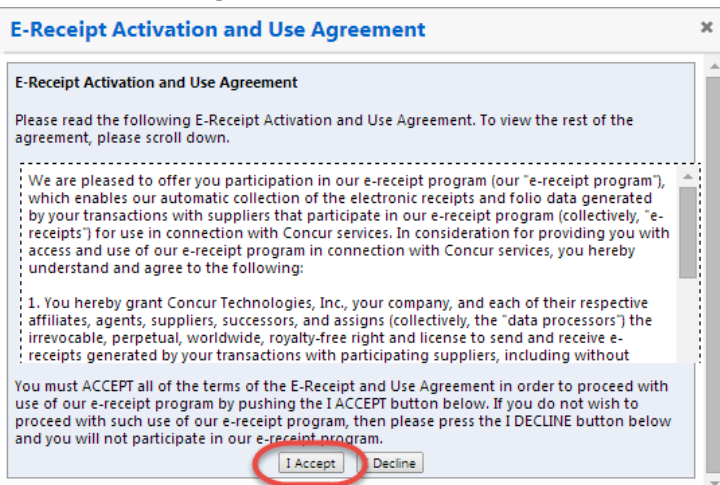
1. On your **My Concur** page, in the **Travel Alerts** section, click **Sign Up Here**.



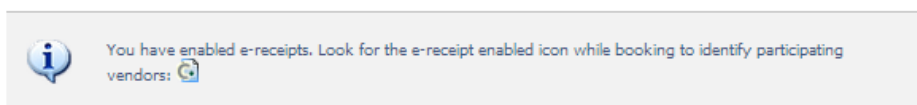
2. Click **E-Receipt Activation** when the page displays. The **E-Receipt Activation and Use Agreement** dialog box displays.



3. Read the **Use Agreement** and click **Accept**.



4. The following message will display and confirm your activation.



Apply for a Travel Card



To help WSU employees manage their travel expenses, the University offers employees participation in Wayne State University's Travel Card Program. This Travel Card is a credit card that is used to expense travel costs incurred while traveling on approved Wayne State business. By charging travel expenses to the Travel Card, you do not incur charges to your personal credit card.

The Travel Card is a MasterCard offered through JPMorganChase. It takes from two to three weeks to process the Travel Card application.

Cardholder Responsibilities

Below is a summary of card holder responsibilities. These responsibilities are described in more detail on the Cardholder Agreement.

1. This travel card is not intended for personal use. (non-travel related charges)
2. All charges against this travel card are the sole responsibility of the card holder.
3. Payment for all charges to the card are the card holder's responsibility.
4. Any losses resulting from the misuse, unauthorized use or failure to pay balances is the responsibility of the card holder.
5. Card holder agrees to return the card to the University upon request or termination.
6. Termination of card privileges does not exempt the card holder from financial responsibilities for payment of charges.
7. WSU will pay outstanding charges in the event card holder terminates employment and seek reimbursement from terminated employee.
8. Protect the card and card number from theft or loss.
9. Card holder agrees to comply with travel policies and requirements for card usages. Failure to comply could result in termination of employment.
10. Card holder authorizes the business manager or University Program Administrator access to view spending information and payment history.

Applying for a Travel Card

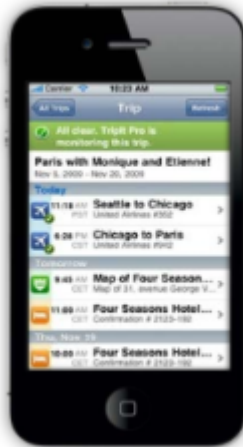
To obtain a Travel Card, you must submit a Cardholder Agreement. The agreement contains a cardholder agreement and an application to JPMorganChase to open a travel card account. The form must be approved by your Business Affairs Officer (BAO).

Here are some highlights of the Travel Card:

- JP Morgan Chase travel cards are available to travelers upon BAO approval
- An application must be filled out by the traveler; the application states the agreement between Traveler and WSU
- Travelers' credit is not checked nor impacted by travel card
- Application must be approved by the BAO, Department Chair/Director, and Dean/AVP/VP
- WSU will pay JP Morgan Chase for approved WSU travel card expenses
- Employee is responsible for payment of personal charges (personal charges incurred while travel, e.g. movie rental, in-room beverages and snacks)

The form can be found on [TravelWayne's Travel Card](#) web page. A list of cardholder features, benefits, and MasterCard Travel Assistance Services.

Activate a Triplt Pro Subscription



Overview

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

Triplt Pro provides an organized view of your travel itinerary and provides valuable monitoring of your flight status so you can focus on your work at hand.

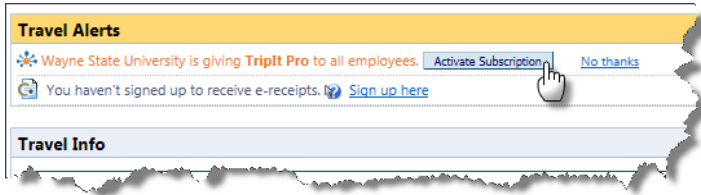
Triplt Pro also allows you an opportunity to organize your points across your various airlines, hotels, and rental car companies. The inner circle feature enables you to share your itinerary details with individuals you place in your 'Inner Circle'. Triplt Pro will monitor US-based flights and will provide a refund if the price of your flight is reduced.

Features of Triplt Pro:

- Master itinerary
- Calendar integration
- Flight alerts
- Triplt Groups
- Points tracker
- Airfare monitoring
- Alternate flights
- Inner Circle

Activate Your Subscription

1. Log into Travel Wayne.
2. On your My Concur page, click the **Activate Subscription** button located under Travel Alerts.



3. When the page refreshes, enter your **Pipeline** password in the password field and click the **Sign Up** button.

Activate Your TripIt Pro Subscription

You now have TripIt Pro to help you manage all your trip details.



One Place for All Your Travel Plans

Organize trip details into one master itinerary — even if your arrangements are booked on multiple websites.

Get Notifications on the Go

Easily get your flight status and refund alerts.

Activate your subscription.

Email Address

Password

Password help: It is best not to use your network or corporate password.

Already have a TripIt account? [Sign In](#)

By clicking Sign up, you confirm that you accept the [User Agreement](#). We don't share your email addresses. [More Info](#)

4. The next screen tells you an email has been sent to your WSU email address.

Activate Your TripIt Pro Subscription

You now have TripIt Pro to help you manage all your trip details.



One Place for All Your Travel Plans

Organize trip details into one master itinerary — even if your arrangements are booked on multiple websites.

Thanks for signing up!

We have created a new TripIt account with this email address ar0696@wayne.edu

Just to be absolutely sure this is you, we have sent you a verification email.

Once you get the email simply click the link to verify this account. Don't see the email? Check your spam folder or contact us for assistance.

5. Log into you WSU email account and click the link to activate your TripIt account. Click the **Continue** button on the web page. You will now be prompted to complete several of the TripIt features.
6. You can add contacts to share your travel schedule.

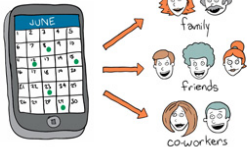
Share your travel schedule

Connect to contacts from your Gmail, Google Apps, or Yahoo account.

Lookup contacts for:

Gmail / Google Apps / Yahoo email


Don't worry - we won't share this information or send anything to your contacts until you tell us to.



Skip this for now

Look Up Contacts

7. You can update how you would like to receive your travel alerts.



Welcome aboard! Let's set up Triplt Pro.

How would you like to receive alerts?

Step 1 of 2


Triplt Pro notifies you by email or mobile of events that might impact your travel. We'll send you alerts when flights are late or when gate assignments change, and give you up-to-the-minute details about imminent departures, connections, and arrivals.

Send me travel alerts by:

Email

SMS [Add an SMS number](#)





8. Learn more about Triplt features.




Your travel just got easier.


Welcome to Triplt Pro! As of right now, we're monitoring your upcoming itineraries.


Step 2 of 2 - Take a moment to learn about Triplt Pro

-  **Travel alerts**
Review alerts you've signed up for — these include check-in reminders and alerts about travel delays.
-  **Point Tracker**
Track all of your frequent flyer programs, hotel points and other rewards in one convenient place. [Go to Point Tracker](#) to get started.
-  **Inner Circle**
Create your inner circle. Add your spouse, admin, or anyone else who needs to know your travel plans, and we'll start automatically sharing your trips with them.
-  **Triplt's mobile support**
It's easy to use your favorite mobile device to look up a flight number, check a hotel address, get driving directions or access any information on Triplt. [Learn more](#)

Exclusive offers for Pro members NEW

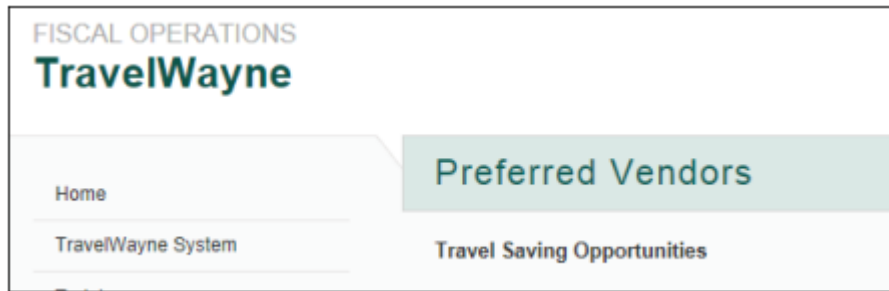
 **Hertz #1 Club Gold® Membership**
Pick up your car with no lines at over 40 airports. Enroll to receive a complimentary one-year membership.

 **Hertz: Up to 10% Off Car Rentals**
Get up to 10% off all rentals. Enter CDP# 1847596 or book your rental now.

 **One-Year Regus Businessworld Preferred Membership**
Enroll now for access to 1,700 business lounges worldwide.

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Using Preferred Vendors



WSU Disbursements, Procurement and Strategic Sourcing have teamed up to bring cost savings to Wayne State travelers. TravelWayne provides travelers with access to discounts across our top travel suppliers when the TravelWayne online booking solution or Conlin Travel agents are utilized to book travel.

The following is a list of commodities are available through preferred vendors at a reduced savings to the University:

- Airfare
- Car Rental
- Airport Parking
- Limousine Service
- Hotel Accommodations

For the names of the vendors who provide these services, visit [Preferred Vendors](#) on the TravelWayne website.

Setting Up a Travel Arrangers & Delegates

When administrative assistance is available within a unit, there are two Concur roles that can aid the traveler in both processing travel requests and/or processing expense reports.

- Travel Assistant
- Delegate

One person can perform both of these roles or the roles can be split between two individuals. Individuals who will be assigned these roles must already have an established Concur account.

Travel Assistant

Your Concur account allows you to have one or more travel assistants. Travel assistants are authorized to make travel arrangements on your behalf. Having a travel assistant has the following benefits:

- Create and submit travel requests.
- Book travel arrangements.
- View your upcoming trips whether he/she booked the travel arrangements or they were booked by another.
- View and modify your profile.

If you would like your travel assistant to receive any agency-generated emails about your trips, set this person as your primary assistant for travel. A primary travel assistant must have a work phone number in his/her Concur profile.

Delegate

Your Concur account, also, allows you to have one or more delegates. Delegates are authorized to process expense reports on your behalf. Having a delegate has the following benefits:

- Create expense reports but NOT submit them. (Employee must access the expense report and submit it for approval.)
- Attach receipts to expense reports.
- Receive emails on your behalf.

Pre-assigned Assistants and Delegates

During implementation, your unit may have established travel assistants and delegates and pre-assigned them to travelers in the unit. If you find that you have been assigned one or more travel assistants and/or delegates and these individuals meet your needs, there is no need to continue with this process. However, if you would like to change an individual within a role or add someone else as a backup, the steps below will guide you through the assignment for each role.

Whether you are using one or two people to function in these roles, each roles has its own process for accomplishing the assignment.

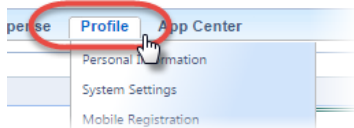
- [Assigning a Travel Assistant](#)
- [Assigning a Delegate](#)

Assigning a Travel Assistant

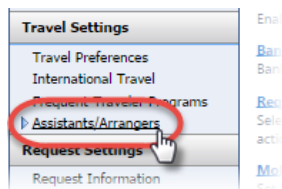
Travel Assistants can create and submit travel requests and book travel for another, but they cannot process expense reports. You can have someone else process your expense reports by [Assigning a Delegate](#) who will be authorized to process expense reports for you. Your travel assistant and delegate may be the same person.

After logging into Concur, follow these steps to assign a **Travel Assistant**:

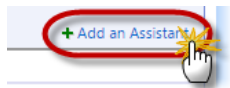
1. Click **Profile** on the Concur tab bar.



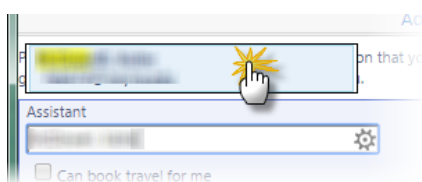
2. After your **Profile** page displays, in the **My Profile** panel, under **Travel Settings**, click **Assistants/Arrangers**.



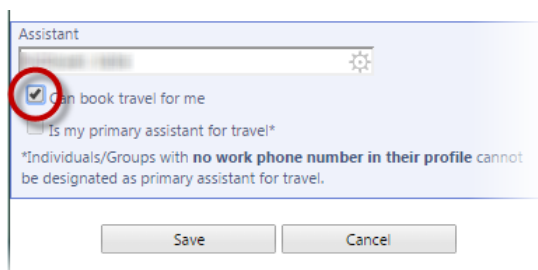
3. Click the **Add an Assistant** link on the right side of the screen. The **Add an Assistant** window will open.



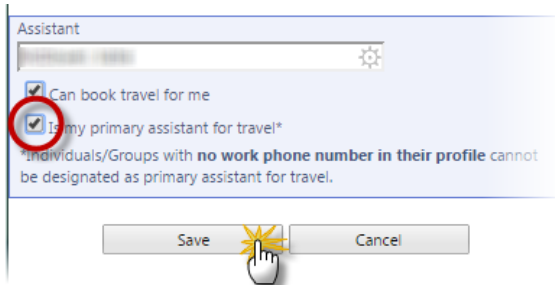
4. In the **Assistant** field, type the last name of the individual you want to assign as a travel assistant. Continue typing his/her last name until the selection becomes visible. Once it displays, click the person's name.



5. Below the person's name, check the box **Can book travel for me**. This will authorize he/or she to function as your travel assistant.



6. If you would like to have this person act as your primary travel assistant, check the box **Is my primary assistant for travel**. If not, leave the check box unchecked.



Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

Save Cancel

7. Click **Save**.

By assigning an individual as your travel assistant, he or she can begin [Planning Your Travel](#) and [Booking Your Travel](#).

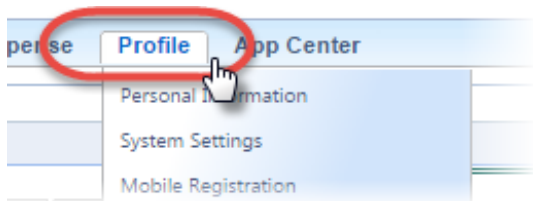
Assigning a Delegate

Delegates can process your expense reports, but he or she cannot process travel requests or book travel for you.

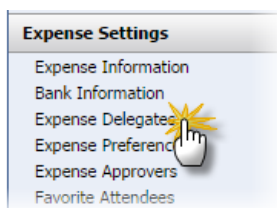
You can have someone else process travel request and book travel by [Assigning a Travel Assistant](#) who will be authorized to process travel request and book travel for you. Your delegate and travel assistant may be the same person.

After logging into Concur, follow these steps to assign a **Delegate**.

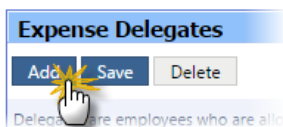
1. Click Profile on the Concur tab bar.



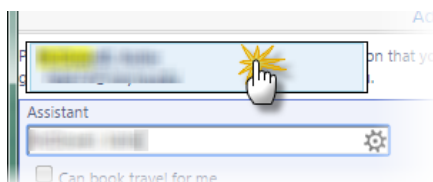
2. After your **Profile** page displays, in the **My Profile** panel, under **Expense Settings**, click **Expense Delegates**.



3. When the page scrolls to **Expense Delegates**, click the **Add** button.



4. When the search field displays, begin typing the last name of the person you want to assign as your delegate. Click the his/her name when it displays. The person will be added to your list of delegates.



5. Define the role(s) you want this delegate to perform by click the check boxes a appropriate.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions to the delegate.

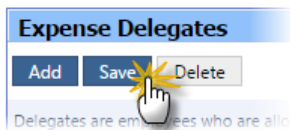
<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	John Smith j.smith@wayne.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Can Prepare (expense reports)

Can View Receipts (and attach receipts to expense reports)

Receives Emails (from agency-generated emails)

6. Click **Save** when complete.



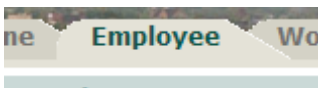
By assigning an individual as your delegate, he or she can begin [Expensing Your Travel](#).

Section 3: Preparing Your Travel Request



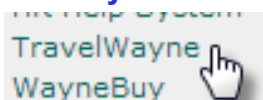
As you begin to plan your travel and estimate your travel costs, you will want to create a travel request to capture the information you discover. All travel at WSU requires the creation of a travel request that must be reviewed by your manager and possibly other individuals within your department. To create a new travel request, you begin by logging into **Pipeline** and opening **TravelWayne**.

1 Employee Tab



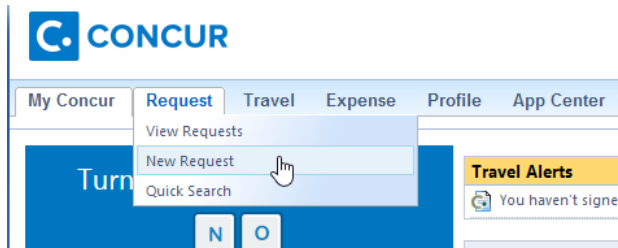
Log into Pipeline. Click the **Employee** tab.

2 TravelWayne



Located in **Administrative Systems**, click the **TravelWayne** link. TravelWayne will open. TravelWayne is the name given the system, however, it run on a software application called **Concur**.

New Request



On the TravelWayne tab bar, hover over **Request** and when the drop-down menu displays click **New Request**. A new request will open with the **Request Header** displayed.

Request

Trip Title (Short Description):

Request Header Segments Approval Flow Audit Trail

Destination Travel Type

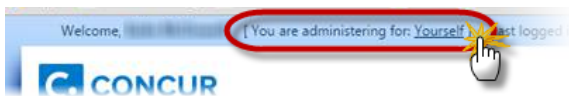
Acting as A Travel Assistant

This section is for Travel Assistants **ONLY**. If you are planning your own travel, please skip this section and continue with [Gathering Supporting Documentation](#).

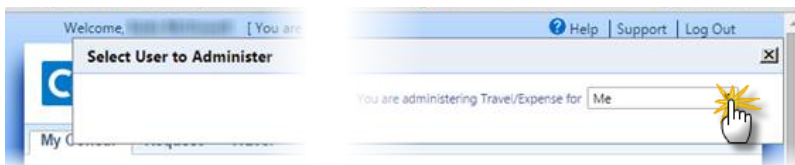
If you are a **travel assistant** and the person who is traveling has [assigned you as a travel assistant](#), The following steps will show you how to begin creating a travel request for that person.

After logging into Concur, follow these steps to begin creating a travel request for another person.

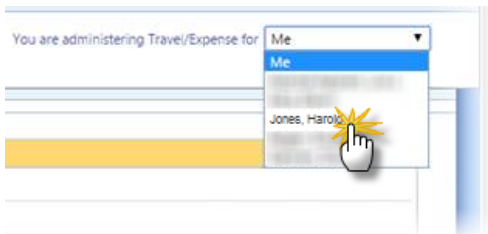
1. At the top of the Concur screen, you will see a link, **You are administering for Yourself**. Click the underlined word, **Yourself**.



2. When the Select User to Administer box displays, click in Me in the field **You are administering Travel/Expense for**. A drop-down list of individuals who have assigned you as their travel assistant will display.



3. Click the name of the person you want to create a travel request for.



4. You are now acting as this person's travel assistant. You are authorized to perform the following tasks for this person:

- Create and submit travel requests.
- Book travel arrangements.
- View your upcoming trips whether he/she booked the travel arrangements or they were booked by another.
- View and modify your profile.

Note: You will perform the tasks above just as you would if you were creating a travel request yourself.

5. You will continue to act as this person's travel assistant until you follow steps 1 through 3 above and select yourself, Me, or select another person to act as their travel assistant.

Important: As a travel assistant, you will NOT be able to process expense reports for the individuals you assist unless you have also been [assigned as their delegate](#).

Gather Supporting Documentation

Collecting Your Supporting Documentation

While planning your travel, you will encounter documentation that will be required by the University to support your travel expenses. Some of the supporting documentation, e.g. a conference agenda, may need to be attached to your travel request. Other documentation, e.g. hotel receipts, will not be required until you are completing your travel expense report after your travel has occurred. The point is: gather your documents when they present themselves.

Types of Supporting Documentation

WSU's Travel Expense Policies and Procedures, [Section 7.1](#), identifies very specifically the types of expenses that require documentation and the types of documentation to support the expenses.

The table has been extracted here for illustrative purposes. ALWAYS view the Administrative Policies and Procedures Manual to verify the current information.

Type of Expense	Documentation	Supplemental
Airfare and baggage fee	Passenger itinerary and proof of payment	n/a
Lodging	Itemized hotel bill and proof of payment	Zero balance receipt
Car Rental	Itemized rental car receipt	Zero balance receipt
Personal Auto	Mileage claimed for trip	Google-type map giving approximate mileage
Conference/Meeting Registration	Registration form when present and the agenda or meeting schedule	Include pages containing the location of the conference, cost of conference, the schedule and those pertaining to the traveler's involvement at the conference. Individual membership fees should be reported separately and require the approval of the respective Vice President or Dean.
All expense items including taxi, incidentals and other expenses	Itemized receipt for each item greater than \$15	

Estimate Travel Expenses

To complete your travel request, you will need to enter estimates of the anticipated costs of your travel, e.g. airfare, car rental, meals, etc. These estimates (contained in the travel request) will be reviewed and approved by your manager to ensure the travel costs are reasonable and within the unit's budget.

There is no established best practice for estimating your travel expenses in terms of how you accomplish the task. You may choose to use the internet or a travel planning app you have on your mobile device. There is, however, a tool inside Concur that can assist you in doing your planning and cost estimates. The tool is called **Trip Search** and it is located on the **My Concur** tab. One benefit of using **Trip Search** is that WSU travel policies have been integrated into our Concur system. This means you will get indicators that will inform you as to whether or not the price/fee of a selection falls within costing guidelines established by WSU.

You can use **Trip Search** to estimate the following expenses:

- [Airfare](#)
- [Car Rental](#)
- [Hotel](#)
- [Taxi](#)
- [Railway Fare](#)

Note: Estimating other travel-related expenses, e.g. limousine service, parking fees, etc., will require use of additional sources, e.g. using the internet, smart-device applications. However, remember alternative sources will not indicate whether or not a price/fee is within established WSU travel guidelines. You must verify these prices/fees by referencing WSU Travel Policies. Click this link, [Review WSU Travel Expense Policy & Procedure](#) to open the review page within this guide.

Which ever means you choose to plan your travel, you can help control travel costs by visiting the **TravelWayne's Preferred Vendor** list and making your vendor selections from there. These travel suppliers provide discounts to WSU travelers.

CRITICAL: In addition to providing estimates for your travel costs, **Trip Search** can also be used to book your travel arrangements. **DO NOT** book any travel arrangements until you receive notification that your travel request has received FINAL approval (Your travel request may require approvals other than your manager's).

Estimating Air Ticket With Trip Search

Enter Your Airfare Criteria

1. In the **Trip Search** panel of your **My Concur** page, verify the **Air/Rail** tab is selected.

The screenshot shows the 'Trip Search' panel with the text 'Plan your flight, car and hotel:' and a search input field containing 'e.g. flight from JFK to Paris on Tuesday'. Below the input field are tabs for 'Air/Rail', 'Car', 'Hotel', 'Taxi', 'Rail', and 'Flight Status'. The 'Air/Rail' tab is highlighted with a red circle. Below the tabs are radio buttons for 'Round Trip', 'One Way', and 'Multi-Segment'.

2. If this is a round trip airfare, make sure the **Round Trip** radio button is selected.

This screenshot is similar to the previous one, but the 'Round Trip' radio button is highlighted with a red circle, indicating it is the selected option.

Note: **Round Trip** flights may involve one or more "stops." These stops are not "segments." They are stops in a single flight. **Multi-Segment** travel involves a *first* flight to Destination A, then a *second* flight to Destination B before a *third* flight returns you to your point of origin.

3. In the **Departure City** field, begin typing the name of the departure city. If there is more than one airport servicing the city, a list of airports will display. Select the appropriate airport by clicking on it.

The screenshot shows the 'Departure City' dropdown menu with 'detro' entered in the search field. The dropdown list displays three options: 'DTW Detroit Area Airports', 'DTW Detroit Wayne County Arpt', and 'YIP Willow Run Arpt', each with its location 'Detroit, MI, United States of America' listed below it.

The airport will display in the **Departure City** field.

The screenshot shows the 'Departure City' field now populated with 'Detroit, MI - Detroit Area Airports'. Below the field are two links: 'Find an airport' and 'Select multiple airports'.

4. Repeat the same process for the **Arrival City**.

The screenshot shows the 'Arrival City' dropdown menu with 'MDW - Midway - Chicago, IL' selected and highlighted in blue. The dropdown list also shows 'CHI Chicago Area Airports' and 'ORD O'Hare Intl Arpt', both with their locations 'Chicago, IL, United States of America' listed below them.

- Click in the **Departure** date field. A calendar will open with the current date displayed. Use the navigation arrows to the left and right of the date to locate your departure date.



The departure date will be entered into the field.



- Click the departure time field and a drop-down menu will display. Click the approximate time of your required departure.

- The last field provides some control on the search parameters. The default is *plus* or *minus* 3 hours of the departure and return times. By clicking the field you can tighten or expand the search parameters

Note: After selecting a departure date, the system automatically inserts a return date of *plus* one day.

8. Click the **Return** date field to display the calendar, then repeat steps 5 and 6 to enter the **Return** date and time of your trip.

Departure  09/14/2014 depart 05:00 pm ± 3 

Return  09/19/2014 depart 10:00 am ± 3 

9. Before clicking the **Search** button, you have the option of how you want the search results displayed: by price or by schedule. Sorting by **Price** is the default. If you would rather sort by schedule, click the **Schedule** radio button. Click **Search**.











Search flights by: Price Schedule

Flights w/ no double connections:

10. At the top of the search results, is a summary of the search findings. The 3 diamonds under Delta and American Airlines indicate that these carriers are Wayne State *preferred* carriers.

Detroit, MI To Chicago, IL Sun, Sep 14 - Fri, Sep 19 Print / Email













Baggage Fee Policies Hide matrix

								
All 88 results								
Nonstop 80 results	174.89 19 results	178.00 20 results	68.00 2 results	193.00 3 results	235.00 6 results	292.00 16 results	338.00 14 results	--
1 stop 8 results	348.56 1 results	334.00 4 results	--	--	310.00 1 results	--	--	502.00 2 results





11. A list of air and rail fares appears below the summary. The list is sorted from the least expensive to the most expensive regardless of the departure and return times. The first two entries in this list are rail fares. The third and fourth entries begin the airfares.

Shop by Fares Shop by Schedule Sorted By: Price - Low to High

Displaying: 88 out of 88 results. << Previous | Page: 1 of 9 | Next >> | All

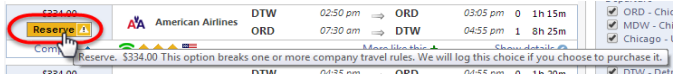
Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$68.00		Detroit...	06:23 pm	Chicag...	10:57 pm 0 5h 34m
<input checked="" type="button" value="Fares"/>		Chicag...	12:50 pm	Detroit...	07:13 pm 0 5h 23m
<input type="button" value="Compare"/>		R	<input type="button" value="More like this"/>	<input type="button" value="Show fares"/>	
Starting From: \$68.00		Detroit...	06:23 pm	Chicag...	10:57 pm 0 5h 34m
<input checked="" type="button" value="Fares"/>		Chicag...	07:20 am	Detroit...	02:04 pm 0 5h 44m
<input type="button" value="Compare"/>		R	<input type="button" value="More like this"/>	<input type="button" value="Show fares"/>	
\$174.89		DTW	03:30 pm	ORD	03:47 pm 0 1h 17m
<input checked="" type="button" value="Reserve"/>		ORD	07:00 am	DTW	09:19 am 0 1h 19m
<input type="button" value="Compare"/>	  	<input type="button" value="More like this"/>	<input type="button" value="Show details"/>		
\$174.89		DTW	03:45 pm	MDW	04:02 pm 0 1h 17m
<input checked="" type="button" value="Reserve"/>		ORD	07:00 am	DTW	09:19 am 0 1h 19m
<input type="button" value="Compare"/>	  	<input type="button" value="More like this"/>	<input type="button" value="Show details"/>		

If you hover your mouse pointer over the green **Reserve** button, a screen tip appears informing you that this flight "conforms to your company (university) travel rules."

\$174.89		DTW	03:30 pm	ORD	03:47 pm 0 1h 17m
<input checked="" type="button" value="Reserve"/>		ORD	07:00 am	DTW	09:19 am 0 1h 19m
<input type="button" value="Compare"/>	  	<input type="button" value="More like this"/>	<input type="button" value="Show details"/>		
\$174.89		DTW	03:45 pm	MDW	04:02 pm 0 1h 17m

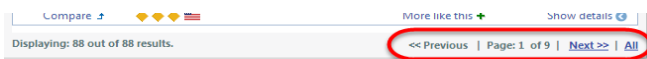
Reserve. \$174.89 This trip conforms to your company travel rules.

If the **Reserve** button is golden rod, the screen tip informs you that **"This option breaks one or more company (University) travel rules."** Booking a flight like this will require special justification to your approver.

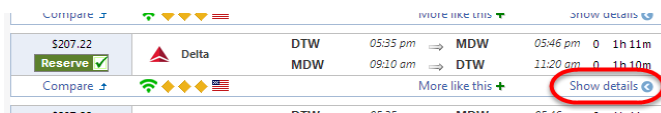


Note: There are times when specific needs require the selection of an option that "breaks one or more University travel rules." Selecting this option will require additional written justification to our approving manager(s) to substantiate the need.

If the options on the first page of the search results do not meet your requirements, use the navigation controls at the bottom of the section to the next page.



12. Locate the option that best meets your requirements and click the **Show Details** button.



The airfare details will display. You see detailed flight information and fare rules.

Outbound flight: Detroit, MI (DTW) - Chicago, IL (MDW) Sun, Sep 14

Delta #5391	Detroit Wayne County A... (DTW) Depart: Sunday, 05:35 pm Stops: 0 Duration: 1h 11m Economy: V Canadair Regional Jet 700	Midway (MDW) Arrive: Sunday, 05:46 pm
-------------	--	--

Return flight: Chicago, IL (MDW) - Detroit, MI (DTW) Fri, Sep 19

Delta #4881	Midway (MDW) Depart: Friday, 09:10 am Stops: 0 Duration: 1h 10m Economy: X Canadair Regional Jet 700	Detroit Wayne County A... (DTW) Arrive: Friday, 11:20 am
-------------	---	---

Delta - (Worldspan)
[Fare Rules](#)
 Ticket non-refundable - penalties may apply
 Change fee likely applies (plus fare difference, see fare rules)
[View more fares](#)

13. Review the list of flights that displays. When you find one that meets your needs, note the total airfare to the left of the flight information. In this example, it is \$213.42. This amount will be entered into the Amount field on the [Air Ticket Segment](#) of the travel request.

Detroit, MI To Chicago, IL Sun, Sep 14 - Fri, Sep 19 [Print / Email](#)

[Show fare display legend](#) Show matrix

Shop by Fares | Shop by Schedule | Sorted By: Price - Low to High

[Expand All Details](#)

Displaying: 26 out of 26 results. << Previous 1 2 3 Next >> | All

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From:		Detroit...	Chicago...	0	5h 34m
\$213.42	Delta	DTW 05:35 pm MDW 07:05 am	MDW 05:46 pm DTW 09:16 am	0	1h 11m

Estimating Car Rental With Trip Search

Enter Car Rental Criteria

1. In the **Trip Search** panel of your **My Concur** page, verify the **Car** tab is selected.

The screenshot shows the 'Trip Search' panel with a search bar containing 'e.g. flight from JFK to Paris on Tuesday' and a 'Search' button. Below the search bar are tabs for 'Air/Rail', 'Car', 'Hotel', 'Taxi', 'Rail', and 'Flight Status'. The 'Car' tab is highlighted with a red circle. Below the tabs are fields for 'Pick-up date' and 'Drop-off date'.

2. Enter the date and (approximate) time of your of your arrival. This is when you will be picking up the car from the car rental agency.

The screenshot shows the 'Pick-up date' and 'Drop-off date' fields. The 'Pick-up date' field is highlighted with a red circle and contains '12:00 pm'. Below the date fields are radio buttons for 'Airport Terminal' (selected) and 'Off-Airport', and a text input field for 'Please enter an airport.'. There is also a checkbox for 'Return car to another location'.

3. Click anywhere in the **Pick-up Date** field. A calendar will display. Navigate to your departure date and select it. Date will appear in the field.

The screenshot shows a calendar for September 2014. The date '14' is highlighted in blue. Below the calendar is the 'Pick-up date' field, which now contains '09/14/2014' and '12:00 pm'.

4. Click anywhere in the **Pick-up Time** field. A list of times will display. Navigate to your estimated time you will pick-up the car. Your estimated pick-up time will display.

The screenshot shows the 'Pick-up time' dropdown menu. The date '09/14/2014' is visible. The dropdown list contains the following times: 04:45 pm, 05:00 pm (highlighted), 05:15 pm, 05:30 pm, 05:45 pm, 06:00 pm, 06:15 pm, and 06:30 pm.

5. Enter the date you will be returning the car to the rental agency. Click anywhere in the field and a calendar will appear. Navigate to the return date and select it.

The screenshot shows a calendar for September 2014. The date '19' is highlighted in blue. Above the calendar is the 'Drop-off date' field, which now contains '09/19/2014' and '12:00 pm'.

6. Click anywhere in the **Return Time** field. Navigate to the estimated return time and select it.

7. In the **Pick-up Car At** field, choose your option for pick-up: at the airport or off-airport (another location).

8. If you are picking up the car at the airport, enter the name of the airport or the city where it is located. Click in the **Please enter an airport** field and begin typing, when the name of the airport displays, click it to select it.

9. Click the Search button to conduct your search for a car.

10. When the search is complete, the car agency matrix will display. If the car agency matrix is not displayed when the search is complete, click the **Show Matrix** link that appears toward the right of the screen.



11. Looking at the matrix, you can see WSU's preferred car rental agencies at the top of the matrix: **Enterprise** and **National** car rentals located at the top of the matrix. Remember: preferred vendors (identified by the three diamonds, **◆◆◆**) provide negotiated discounts to WSU travelers.

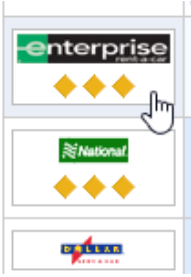
Picking up the car at: (MDW) on Sun, Sep 14 05:00 PM
Returning on Fri, Sep 19 08:30 AM

[Print / Email](#)

[Hide matrix](#)

All 94 results	Mini Car	Economy Car	Compact Car	Intermediate Car	Standard Car	Standard Convertible	Full-size Car	Pr
Enterprise ◆◆◆	--	53.00	54.00	56.00	58.00	--	60.00	
National ◆◆◆	--	55.00	57.00	58.00	62.00	--	62.00	
Alamo	--	47.00	48.00	50.00	51.00	--	51.00	

12. Below the matrix is a list of the all cars provided by all the car rental agencies that meet the requirements you entered into **Trip Search**. You can sort the list by clicking the appropriate agency icon in the matrix. Example: to display all the cars offered by **Enterprise**, click the **Enterprise** icon.



13. The list of available cars offered by **Enterprise** is arranged by cars that meet WSU guidelines first followed by Enterprise cars that do not meet the WSU guidelines. **Remember**: selecting a car that is not within WSU guidelines will require written justification to your approving manager(s). The green background on the Reserve button indicates that the car is compliant with WSU guidelines. The amber background indicates the car does not comply with WSU guidelines.

Sorted By: Policy - Most Compliant

Economy Car (Worldspan) ◆◆◆	Unlimited miles Pick-up: Terminal: MDW Automatic transmission Total cost \$383.49*
\$53.00 per day (Corporate rate) Reserve ✓	
Compact Car (Worldspan) ◆◆◆	Unlimited miles Pick-up: Terminal: MDW Automatic transmission Total cost \$390.17*
\$54.00 per day (Corporate rate) Reserve ✓	
Intermediate Car (Worldspan) ◆◆◆	Unlimited miles Pick-up: Terminal: MDW Automatic transmission Total cost \$403.50*
\$56.00 per day (Corporate rate) Reserve ✓	
Standard Car (Worldspan) ◆◆◆	Unlimited miles Pick-up: Terminal: MDW Automatic transmission Total cost \$416.83* ⚠ Please select an in policy cc selection your reservation will b
\$58.00 per day (Corporate rate) Reserve ⚠	
Full-size Car (Worldspan) ◆◆◆	Unlimited miles
	Unlimited miles

14. When you locate the car that meets your requirements, note the total cost of the rental. This total will be entered into the [Car Rental Segment](#) of your travel request.

Compact Car (Worldspan) ◆◆◆	Unlimited miles Pick-up: Terminal: MDW Automatic transmission Total cost \$390.17*
\$54.00 per day (Corporate rate) Reserve ✓	

Estimating Hotel Reservation With Trip Search

Choose Your Hotel Search Criteria Option

When finding your hotel within Trip Search, there are four alternatives you can use to search for your hotel:

- Airport (proximity)
- Address
- Company (University) Location
- Reference point/Zip Code

Your choice of alternative will depend on the information you have for your search criteria. Each alternative display a different set of criteria with which to search. The default is Reference Point/Zip Code. Notice the change in search criteria as each of the alternative is selected.

Reference Point/Zip Code

If you are unfamiliar with the area surrounding your destination but do have a destination or zip code in mind (*and are not staying near the arrival airport*), choose this option.

A screenshot of the Trip Search form. The 'Reference Point / Zip Code' radio button is selected and circled in red. Below it is a text input field with the placeholder text '(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')'. There are also checkboxes for 'With names containing:' and 'Add Another Hotel', and a 'Search' button.

Airport

If you plan to stay at a hotel near your destination airport, choose this option.

A screenshot of the Trip Search form. The 'Airport' radio button is selected and circled in red. Below it is a text input field with the placeholder text 'Please enter an airport.'. There are also checkboxes for 'With names containing:' and 'Add Another Hotel', and a 'Search' button.

Address

If you have already selected a hotel where you will be staying and you know the address of the hotel, choose this option.

A screenshot of the Trip Search form. The 'Address' radio button is selected and circled in red. Below it are several input fields: a dropdown menu for 'Country' (set to 'United States of America'), a 'Street' field, a 'City' field, a 'State/Province' field, and a 'Postal Code' field. There are also checkboxes for 'With names containing:' and 'Add Another Hotel', and a 'Search' button.

Company (University) Location

If your work location is somewhere other than an existing WSU facility and your visit requires overnight lodging, choose this option.

Airport
 Address
 Company Location
 Reference Point / Zip Code
 Please choose a company location.
 Please choose a company location.

When you click in the Please choose a company (University) location field, a drop-down listing of WSU facilities displays.

Please choose a company location.
 United States of America - DC
 Government and Community Affairs (Washington, DC)
 United States of America - MI
 Macomb Education Center (Clinton Township, MI)
 Academic Administrative Bldg (AAB) (Detroit, MI)
 Athletic, Intramurals & Recreation (Detroit, MI)
 Career Services (Detroit, MI)
 College of Engineering (Detroit, MI)
 Computing & Information Technology (Detroit, MI)
 Development & Alumni Affairs (Detroit, MI)
 Developmental Disabilities Institute (Detroit, MI)
 Educational Outreach (Detroit, MI)
 Educational Outreach - FAB (Detroit, MI)
 Faculty Administration Bldg (FAB) (Detroit, MI)
 Office of the President (Detroit, MI)
 Scott Hall Medicine Ctr. (Detroit, MI)
 University Center At Macomb (Detroit, MI)
 WSU Welcome Center (Detroit, MI)
 Oakland Center (Farmington Hills, MI)
 Harper Woods Center (Harper Woods, MI)
 Macomb Community College-South Campus Site (Warren, MI)

Enter Your Hotel Reservation Criteria

In this example, you know the name and address of the hotel where you want to make your reservation. You choose the **Address** option.

1. In the **Trip Search** panel on your **My Concur** page, select the **Hotel** tab.

Air/Rail Car **Hotel** Taxi Rail Flight Status
 Check-in Date Check-out Date

2. Click anywhere in the **Check-In Date** field. A calendar will display. Navigate to the date you will check into the hotel and click it. The check-in date will appear in the field.

Check-in Date Check-out Date
 09/14/2014 09/15/2014
 << < Sep 2014 > >>
 Su M Tu W Th F Sa
 1 2 3 4 5 6
 7 8 9 10 11 12 13
 14 15 16 17 18 19 20
 21 22 23 24 25 26 27
 28 29 30
 Add Another Hotel

3. Click anywhere in the **Check-Out Date** field. A calendar will display. Navigate to the date you will check out of the hotel and click it. The check-out date will appear in the field.

Check-out Date

09/19/2014 x

<< < Sep 2014 > >>

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

4. Enter the address of the hotel and click the **Search** button. A **Searching for location** dialog box will display.

Airport
 Address
 Company Location
 Reference Point / Zip Code

Country: United States of America

Street: 17 East Monroe St City: Chicago

State/Province: IL Postal Code: 60603

With names containing:

Add Another Hotel

Search

5. Click anywhere in the **Location** field. If there is more than one location that meets your criteria, select it from the list. Click the **Choose** button.

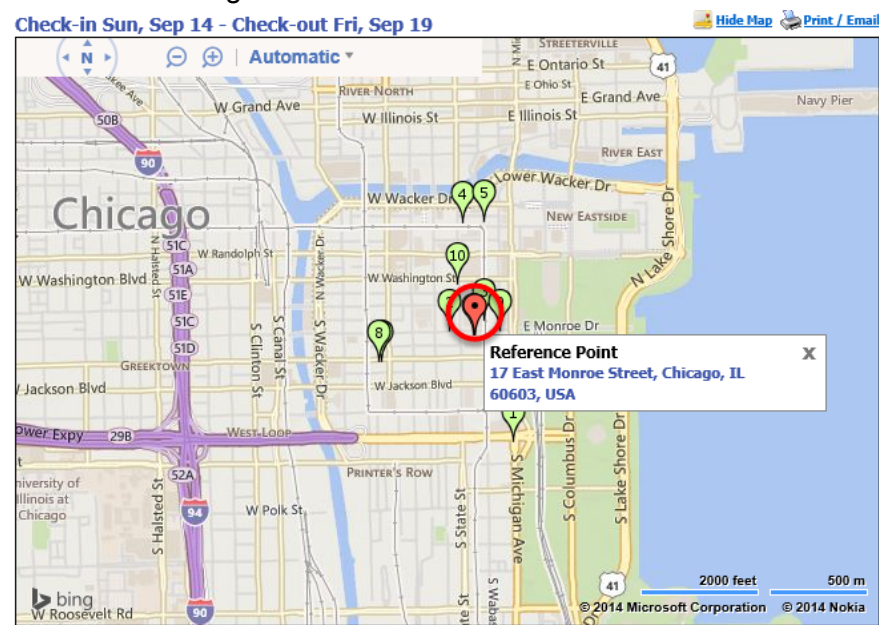
Searching for location... [Close](#)

17 East Monroe St, Chicago, IL







Location:

17 East Monroe Street, Chicago, IL 60603, USA

6. A map showing the location of your hotel selection (indicated by the red bubble) will display along with other hotels within the general area.



7. Below the map is a list of hotels sorted from most economic to those costing more per night's stay. This list enables you to see the daily rate for your selected hotel and that of hotels in the immediate surrounding area. This allows you to choose a hotel with a lower rate that is still in the vicinity of your original selection.

	0.00 miles view map		
E-Receipt Enabled		more info compare	choose room
3. Silversmith Hotel and Suites			
	10 S Wabash Ave Chicago, IL 60603 The Loop 0.06 miles view map	★★★★★ ○○○○○ rate this hotel	from \$299
		more info compare	choose room
4. theWit Chicago - a DoubleTree by...			
	201 N. State Street Chicago, IL 60601 0.37 miles view map	★★★★★ ○○○○○ rate this hotel	from \$359
E-Receipt Enabled		more info compare	choose room
5. Hotel Monaco Chicago			
	225 N Wabash Chicago, IL 60601 New Eastside 0.38 miles view map	★★★★★ ○○○○○ rate this hotel	from \$429
		more info compare	choose room
6. Palmer House a Hilton Hotel			
	17 East Monroe Street Chicago, IL 60603 0 miles view map	★★★★★ ○○○○○ rate this hotel	from \$434
E-Receipt Enabled		more info compare	choose room
7. W Chicago City Center			
	172 W Adams St Chicago, IL 60603-3604 The Loop 0.22 miles view map	★★★★★ ○○○○○ rate this hotel	from \$447

8. Note the daily rate (remember to multiply it times the number of nights stay) and enter it into the Amount field on the [Hotel Reservation Segment](#) of your travel request.

Estimating Taxi Fare With Trip Search

When traveling to some metropolitan areas, it may be more cost effective to rent a taxi to commute locally rather than rent a car. Take Chicago, IL as an example. For most people, it is more convenient, less stressful, and more economic to use public transportation than it is to rent a car.

Enter Your Taxi Criteria

1. In the **Trip Search** panel, click the **Taxi** tab.

The screenshot shows the Trip Search panel with tabs for Air/Rail, Car, Hotel, Taxi, Rail, and Flight Status. The Taxi tab is highlighted with a red circle. Below the tabs, there is a Pick-up date field with a dropdown menu set to 09:00 am.

2. Click anywhere in the Pick-up Date field. A calendar will display. Navigate to the required date and click the date to select it. The date will be inserted into the field. If this taxi is for transportation from the airport to the hotel, the date will be the arrival date of your flight.

The screenshot shows a calendar for September 2014. The date 14 is highlighted with a mouse cursor, indicating it has been selected.

3. Click anywhere in the time field and select the time you want the taxi to be available.

The screenshot shows the Trip Search panel with the Taxi tab selected. The Pick-up date is 09/14/2014. The time field is highlighted with a red circle, showing a dropdown menu with options: 05:15 pm, 05:30 pm, 05:45 pm, 06:00 pm, and 06:15 pm.

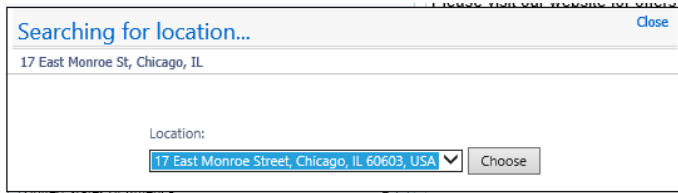
4. Enter the pick-up information. If you are being picked-up from an airport, enter the flight destination city into the **Airport** field. When the list of airports displays, select your destination airport from the list.

The screenshot shows a dropdown menu for the Airport field. The options are MDW Midway (Chicago, IL, United States of America) and ORD O'Hare Intl Arpt (Chicago, IL, United States of America). The MDW Midway option is selected.

5. Enter the **Drop-off Location** address and click the **Search** button.

The screenshot shows the Drop-off Location form. The Address radio button is selected. The Street field contains "17 East Monroe St" and the City field contains "Chicago". The State/Province field contains "IL" and the Zip field contains "60603". The Country field is set to "United States of America". A Search button is at the bottom.

6. When the **Search for Location** dialog box displays, select your drop-off address. If there is more than one possible address, click in the **Location** field to display a list of potential addresses. Click **Choose** once you have made your selection. A list of options will display.



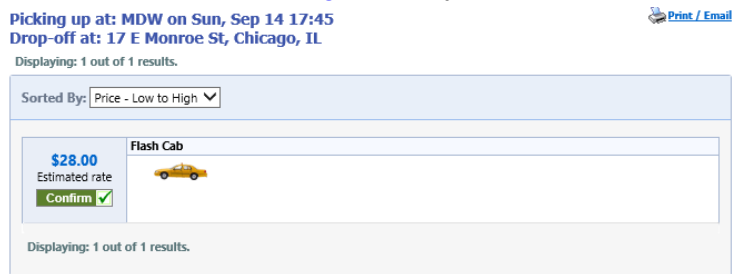
Searching for location... [Close](#)

17 East Monroe St, Chicago, IL

Location:

17 East Monroe Street, Chicago, IL 60603, USA

7. Note the estimated rate (in this example \$28.00) and the taxi company. Enter the amount into the **Amount** field on the [Taxi Fare Segment](#) of your travel request.




Picking up at: MDW on Sun, Sep 14 17:45 [Print / Email](#)

Drop-off at: 17 E Monroe St, Chicago, IL

Displaying: 1 out of 1 results.

Sorted By: Price - Low to High

\$28.00 Estimated rate <input type="button" value="Confirm"/>	Flash Cab 
--	---

Displaying: 1 out of 1 results.

Estimating Railway Ticket With Trip Search

For various reasons, a traveler may choose to travel by railway rather than air travel. When using Trip Search to estimate or book railway travel, this message is display at the top of the Taxi tab:

PLEASE NOTE: Amtrak may limit business travel routes within the Midwest Corridor to those without overnight travel. Amtrak views overnight travel as a leisure route. If you are unable to find suitable reservations online, please book directly with Amtrak.

Also please note that train searches work within a one hour time window. If you do not know a specific train departure time, you may need to adjust your time selection a few times to get results.

Overnight travel described in the message above refers to the traveler who takes a train from Detroit to Kansas City, detrains in Chicago to spend the night. The next day, the traveler re-boards the train and resumes rail travel to Kansas City. Travel by rail in the Midwest Corridor is limited to business travelers.

Enter Rail Fare Criteria

1. Select your type of travel: Round Trip, One Way, or Multi-Segment (more than one destination during this trip)

The screenshot shows the Amtrak logo and three radio button options: "Round Trip" (which is selected), "One Way", and "Multi-Segment".

2. Click in the **Departure Station** field and begin typing the name of the city you are departing from. When the list displays, select your departure station.

The screenshot shows a dropdown menu for the "Departure Station" field. The list includes "Detroit, MI", "Detroit Lakes, MN", and "Departure Station". The option "Detroit, MI" is circled in red and selected in the input field below.

3. Click in the Arrival Station field and begin typing the name of the city you will be arriving in. When the list displays, select your arrival station.

The screenshot shows a dropdown menu for the "Arrival Station" field. The list includes "Chicago - Union Station, IL", "Chico, CA", "ChIPLEY, FL", and "Chippewa Falls - Bus Stop, WI". The option "Chicago - Union Station, IL" is circled in red and selected in the input field below.

4. Enter your **Departure** date and time.

The screenshot shows two input fields for the "Departure" section: a date field containing "09/14/2014" and a time dropdown menu set to "09:00 am".

5. Enter your **Return** date and time. Click the **Search** button.





Return

09/19/2014 10:00 am ▼

Search rail by Price Schedule

6. When the search results display, select you rail travel option and note the total rail fare. Enter the rail fare total in the Amount field on the [Railway Ticket Segment](#) on your travel request.

Displaying: 1 out of 1 results.

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$66.00	 Amtrak Regional	Detroi...	11:20 am ⇒ Chicag...	04:08 pm	0 4h 48m
 Fares 		Chicag...	07:00 am ⇒ Detroi...	01:54 pm	0 6h 54m
Compare ↕		R	More like this +	Show fares Ⓞ	

Estimating Dining

In order to meet the Internal Revenue Service (IRS) regulations for an "Accountable Plan", meal expenses are reimbursed only when the travel requires overnight lodging. WSU utilizes a daily per diem rate to provide a traveler with reimbursement for costs associated with their travel. Rates are established by the General Services Administration and are used to determine reimbursement.

These rates can be found at:

Domestic - (CONUS) <http://www.gsa.gov/portal/category/21287>

Foreign - (OCONUS) <http://www.defensetravel.dod.mil/site/perdiemCalc.cfm>

There are two adjustments required when applying the per diem rate during one's travel.

1. If a conference or meeting provides a meal, the traveler should adjust their per diem downward by the appropriate amount of the provided meal.
2. Meals allowed during a travel day are defined as follows:

Outbound	Breakfast	Lunch	Dinner
Depart before 2:00pm		X	X
Depart after 2:00pm, before 8:00pm			X
Inbound			
Arrive before 12:00pm	X		
Arrive between 12:00pm and 6:00pm	X	X	
Arrive after 6:00pm	X	X	X

The process for estimating your dining expenses is covered in detail in the following three sections:

1. [WSU Meal Allowance Adjustments](#)
2. [Fixed Allowances \(Per Diem\)](#)
3. [Calculating Allowed Meal Expense](#)

WSU Meal Allowance Adjustments

Outbound	Breakfast	Lunch	Dinner
Depart before 2:00pm		X	X
Depart after 2:00pm, before 8:00pm			X
Inbound			
Arrive before 12:00pm	X		
Arrive between 12:00pm and 6:00pm	X	X	
Arrive after 6:00pm	X	X	X

Travel Meal Expenses

The table above was extracted from WSU's Administrative Policies and Procedures Manual, Section 7 Travel Expense Policies and Procedures (Effective 4/1/2012), 7.2 Travel Expenses, [7.2.4 Meals](#). It is used here for illustrative purposes. Before planning your travel, ALWAYS verify the policy and procedure by visiting the website.

Using Your Travel Schedule to Adjust Travel Meal Allowances

There are two adjustments required when applying the per diem rate for planning your travel. First, if a conference or meeting provides a meal(s), the you should adjust their per diem downward by the appropriate amount of the provided meal. Second, meals allowed during a travel day are defined by the table above.

Estimating Meals for a Travel Request

On the days of travel, departure to destination and return to home, your meal expenses are adjusted by the departure and arrival times of your flight. Non-travel days (the days between departure and return) are adjusted when event meals are provided for you.

Referring to the table above, meals for a 3-day trip to Chicago to attend a 1-day meeting with a banquet in the evening would look like this:

Day One - On the day of departure, if your flight leaves after 2:00pm, you would be allowed a dinner expense, but not lunch. You are never allowed breakfast on the day of departure.

Day Two - On the day of the meeting (no meals served at the meeting), you would be entitled to expense both breakfast and lunch, but not dinner because you are attending the banquet that evening.

Day Three - On the return day, if your flight arrives before 12:00pm, you would be entitled to breakfast only.

Fixed Allowances (Per Diem)

The screenshot shows the GSA Per Diem Rates website. Three callouts are present:

- 1 Fiscal Year (FY)**: Points to the 'FY 2014 Per Diem Rates Now Available' header.
- 2 Search by Location**: Points to the search input fields for city and ZIP code.
- 3 Search by State**: Points to the 'SEARCH BY STATE' section which includes a map of the United States.

In order to stay compliant with IRS regulations, WSU uses the General Services Administration's per diem rates to calculate dining allowances while traveling.

Information and screen shots in this section is are based on the fiscal year 2014 and are used here for illustrative purposes. **ALWAYS** visit the [GSA's Per Diem Rates](#) website for current, accurate information.

1 Fiscal Year (FY)

FY 2014 Per Diem Rates Now Available

Always verify the fiscal year before beginning your research.

2 Search by Location

SEARCH BY CITY, STATE OR ZIP CODE (current fiscal year)

Enter your city OR Enter your ZIP Code **FIND PER DIEM RATES**

Select a State

If you know the city/state or zip code of the destination city, you can enter it in this section and click the **Find Per Diem Rates** button. Searching by city and state or zip code will produce a table for that specific location

SEARCH BY CITY, STATE OR ZIP CODE (current fiscal year)

Enter your city OR Enter your ZIP Code **FIND PER DIEM RATES**

Illinois

As an example, if you entered Chicago and selected Illinois from the drop-down menu, the following table would appear:

The following rates apply for 60603														
Primary Destination* (1)	County (2, 3)	Max lodging by Month (excluding taxes)												Meals & Inc. Exp.**
		2013			2014									
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Chicago	Cook and Lake	209	209	128	128	128	186	186	186	186	166	166	209	71

* NOTE: Traveler reimbursement is based on the location of the work activities and not the accommodations, unless lodging is not available at the work activity, then the agency may authorize the rate where lodging is obtained.

3

Search by State

SEARCH BY STATE

Find Rates for:

The Department of Defense sets for rates for Alaska, Hawaii, U.S. Territories, and Possessions (OCO/US rates.) Visit DoD Site >

The State Department sets Foreign rates. Visit State Dept Site >

You can also locate the per diem rate table by clicking the destination state on the map. However, without a specific location within a state, this search will produce a table for the entire state from which you must select the specific location from the table.

You searched for: Illinois														
Primary Destination* (1)	County (2, 3)	Max lodging by Month (excluding taxes)												Meals & Inc. Exp.**
		2013			2014									
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Standard Rate	Applies for all locations without specified rates	83	83	83	83	83	83	83	83	83	83	83	83	46
Bolingbrook / Romeoville / Lemont	Will	88	88	88	88	88	88	88	88	88	88	88	88	51
Chicago	Cook and Lake	209	209	128	128	128	186	186	186	186	166	166	209	71
O'Fallon / Fairview Heights / Collinsville	Bond, Calhoun, Clinton, Jersey, Macoupin, Madison, Monroe and St. Clair	108	108	108	108	108	108	108	108	108	108	108	108	56
Oak Brook Terrace	Dupage	100	100	100	100	100	100	100	100	100	100	100	100	61
Springfield	Sangamon	85	85	85	85	85	85	85	85	85	85	85	85	56

Calculating Allowed Meal Expenses

Using sections [WSU Meal Allowance Adjustments](#) and [Fixed Allowances \(Per Diem\)](#), calculating meal expenses for trip to Chicago would be done like this:

Travel Itinerary

You are attending a 1-day conference in Chicago, IL. At the conclusion of the conference, the hosting organization is providing a banquet for their guests. No other meals are included. Your flight to Chicago departs Detroit at 4:00pm (Eastern) and arrives in Chicago at 4:15pm (Central). Your return flight departs Chicago at 10:00am (Central) and arrives in Detroit at 11:15am (Eastern).

Calculate the Number of Meals Allowed

Outbound	Breakfast	Lunch	Dinner
Depart before 2:00pm		X	X
Depart after 2:00pm, before 8:00pm			X
Inbound			
Arrive before 12:00pm	X		
Arrive between 12:00pm and 6:00pm	X	X	
Arrive after 6:00pm	X	X	X

Day One - Because your flight departing Detroit (outbound) leaves after 2:00pm, but before 8:00pm, you are allowed a dinner expense for this travel day.

Day Two - Your host is providing a banquet for dinner, but is not providing any other meals, you are allowed expenses for both a breakfast and a lunch.

Day Three - Your return flight (inbound) arrives in Detroit at 11:00am, you are allowed a breakfast expense, but not lunch.

Your meal totals looks like this:	Breakfast	Lunch	Dinner
	2	1	1

To ensure there have been no changes to the travel meals policy, view current information at this website, [WSU Travel Meals Allowed](#).

Determine Cost of Meals

Now that you have calculated the type and number of allowable meals, you can determine the per diem for each meal by visiting the GSA's website, [Per Diem Rates](#).

Step 1: After opening the Per Diem Rates web page, enter the destination city/state or zip code. In this example, enter Chicago in the city and select Illinois from the drop-down list. Then click the Find Per Diem Rates button.

SEARCH BY CITY, STATE OR ZIP CODE (current fiscal year)

Enter your city x OR

Illinois

Step 2: When the new page displays, you will see a rates table for Chicago, Illinois. At the far right of the table, you will find the current daily total for all meals and incidental expenses. However, this table does not give you the breakdown by meal that you need to calculate your total meals expense. To display the breakdown of meals and incidental expenses, click the **Breakdown of M&IE Expenses** link below the table.

The following rates apply for **Chicago , Illinois**

Primary Destination* (1)	County (2, 3)	Max lodging by Month (excluding taxes)												Meals & Inc. Exp.**	
		2013			2014										
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep		
Chicago	Cook and Lake	209	209	128	128	128	186	186	186	186	186	166	166	209	71

* NOTE: Traveler reimbursement is based on the location of the work activities and not the accommodations, unless lodging is not available at the work activity, then the agency may authorize the rate where lodging is obtained.

** Meals and Incidental Expenses. See [Breakdown of M&IE Expenses](#) for important information on first and last days of travel.

Step 3: The table that displays has a the breakdown for all daily totals. Locate the total amount you obtained from the previous table and locate that row on this table. Now you can see the breakdown amounts for each meal type.

Total	Continental Breakfast/ Breakfast	Lunch	Dinner	IE
\$46	\$7	\$11	\$23	\$5
\$51	\$8	\$12	\$26	\$5
\$56	\$9	\$13	\$29	\$5
\$61	\$10	\$15	\$31	\$5
\$66	\$11	\$16	\$34	\$5
\$71	\$12	\$18	\$36	\$5

Using the allowable meals calculated above, the travel meal allowances would look like this:

Your meal totals looks like this:	Breakfast	Lunch	Dinner
	2	1	1
Amounts per meal type:	\$24	\$18	\$36

After adding together the totals for each meal type, the total travel meal allowance for this trip is **\$78** dollars.

In this example, to complete the [Dining Segment](#) for this travel request, where you would enter **\$78.00** in the amount field. The remaining detail can be added when completing the **Expense Report**.

Dining Amount: USD

Start Date: At

Detail:

End Date: At

Complete the Request Header

The screenshot shows the 'Request Header' section of a travel request form. The form is titled 'Request 3X94' and has a 'Trip Title (Short Description): IROS Conference'. The status is 'Not Submitted' with an amount of '\$327.00'. The form includes several tabs: 'Request Header', 'Segments', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is active, showing fields for:

- 1** Trip Destination: Chicago
- 2** Travel Type: Out of State Travel
- 3** Short Description: IROS Conference
- 4** Business Purpose: Attend a conference
- 5** Date of Departure: 09/13/2014
- 6** Date of Return: 09/19/2014
- 7** Index: (121411) Engineering Office of the Dean
- 8** Trip Detailed Description: Attend International Conference on Intelligent R
- 9** Student Travel Award?: No
- 10** Guest? (checkbox)
- 11** Comments (text area)
- 12** Student? (checkbox)
- 13** Accompanied By (text field)

 At the top right, there are buttons for 'Cancel', 'Save', 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'.

The request header is a summary of the trip.

1 Trip Destination

Destination
Chicago

Enter the destination of your trip. Entry is required.

2 Travel Type

Travel Type
Out of State Travel

Click anywhere in the Travel Type box to display the drop-down menu.

Travel Type
Out of State Travel x

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

Click the appropriate option to select it from the list. Selection is required.

3 Short Description

Trip Title (Short Description)

IROS Conference

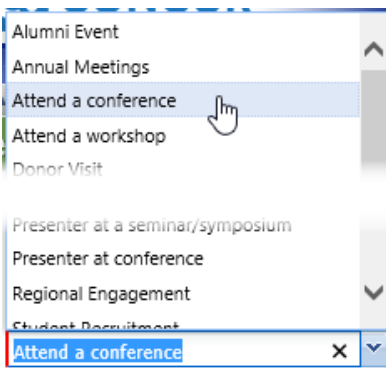
Click in the field to enter a short description. Field is 32 characters wide. This description becomes the name for this travel request in you summary of travel requests. Entry is required.

4 Business Purpose

Business Purpose

Attend a conference

Click anywhere in the Business Purpose box to display the drop-down menu.



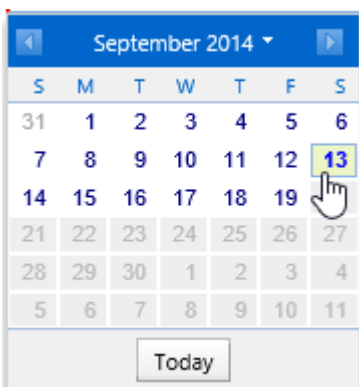
Click the appropriate option to select it from the list. Selection is required.

5 Date of Departure

Date of Departure

09/13/2014

Click anywhere in the Date of Departure box to display the drop-down calendar.



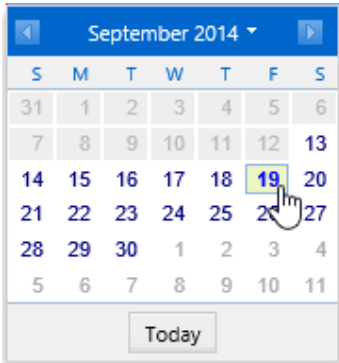
Navigate to the correct month and click the appropriate date. Date is required.

6 Date of Return

Date of Return

09/19/2014

Click anywhere in the Date of Return box to display the drop-down calendar.



Navigate to the correct month and click the appropriate date. Date is required.

7 Index

Index?

(121411) Engineering Office of the Dean

The index indicates where the funds are located to pay for the trip. Index is required.

8 Trip Detail Description

Trip Detailed Description

Attend International Conference on
Intelligent R

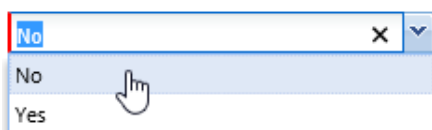
If you selected Other in the Business Purpose field, enter a detailed description of the trip here. This is a multi-line text field that will expand beyond the boundaries of the displayed field.

9 Student Travel Award

Student Travel Award?

No

Click anywhere in the Student Travel Award box to display the drop-down menu.



Click the appropriate option to make your selection. Student Travel Award is required.

10 Guest Guest?

Click the check box if you will be accompanied by a guest.

11 Comments

Comment

Enter additional comments as needed.

12 Student Student?

Click the Student check box if a student will be traveling.

13 Accompanied By

Accompanied By:

If you checked the Guest check box, enter the name of the individual accompanying you.

14 Save Button

When you have completed the **Request Header**, click the **Save** button at the top of the screen. The **Segments** tab will display.

Add Segments to Estimate Travel Costs

Segments Tab

1

Request 3X94
Trip Title (Short Description): IROS Conference

Attachments Print / Email Delete Request **Submit Request**
Status: Not Submitted
Amount: \$327.00

Request Header **Segments** Approval Flow Audit Trail

Add Segment
Click icon to create segment

2 Air Ticket

3 Railway Ticket

4 Car Rental

5 Hotel Reservations

6 Taxi Fare

7 Limousine Reservation

8 Parking Fee

9 Dining

10 Miscellaneous

11 Visa

In TravelWayne, the different elements of your travel plans are called **segments**. When adding segments to your travel request, the first segment you add is added to the bottom of the **Segment** tab. Subsequent segments are added beneath the previous segment.

1 Segments Tab



When finished with the Request Header, click the **Segments** tab. The segments available are:

- Air Ticket
- Railway Ticked
- Car Rental
- Hotel Reservation
- Taxi Fare
- Limousine Reservation
- Parking Fee
- Dining
- Miscellaneous
- Visa

To add a segment to your travel plan, click the appropriate icon.

2 Air Ticket



If your trip involves air travel, click the **Air Ticket** icon to open the **Air Ticket Segment** on the travel request Segments tab. You can enter the ticket details and cost on the [Air Ticket Segment](#).

3 Railway Ticket



If your trip involves railway travel, click the **Railway Ticket** icon to open the **Railway Ticket Segment** on the travel request on the Segments tab. You can enter the ticket details and cost on the [Railway Ticket Segment](#).

4 Car Rental



If you will be renting a car at your destination, click the **Car Rental** icon to open the **Car Rental Segment** on the Segments tab. You can enter the car rental details and cost on the [Car Rental Segment](#).

5 Hotel Reservations



If your trip involves overnight stay, click the **Hotel Reservations** icon to open the **Hotel Reservations Segment** on the travel request Segments tab. You can enter the hotel details and cost on the [Hotel Reservation Segment](#).

6 Taxi Fare



If you will be using a taxi for local transportation at your destination, click the **Taxi Fare** icon to open the **Taxi Fare Segment** on the travel request Segments tab. You can enter the taxi fee details and cost on the [Taxi Fare Segment](#).

7 Limousine Reservation



If your trip involves the use of a limousine, click the **Limousine Reservation** icon to open the **Limousine Reservation Segment** on the travel request Segments tab. You can enter the limousine rental details and cost on the [Limousine Reservation Segment](#).

8 Parking Fee



If you will be incurring parking fees for your personal vehicle or car rental, click the **Parking Fee** icon to open the **Parking Fee Segment** on the travel request Segments tab. You can enter the parking fee detail and cost on the [Parking Fee Segment](#).

9

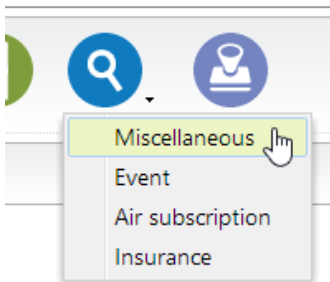
Dining

WSU elected to reimburse Travelers for meals according to a schedule of set reimbursement rates, commonly known as "per diem" or "travel allowance" rates. These rates are determined by government and company policies and may differ depending on location and length of travel as well as partial days of travel, seasonal travel, etc. Travel allowances apply to meals and incidentals. Total dining costs can be entered on the [Dining Segment](#).

10

Miscellaneous

Click the icon to display the drop-down menu of miscellaneous travel expenses. Enter miscellaneous expenses on the [Miscellaneous Segment](#).



11

Visa

This segment is used for Visa or Passport related expenses. Enter these expenses on the [Visa Segment](#).

Air Ticket Segment

Round Trip/One Way

Airline Ticket Cost

1

2

Air Ticket

Round Trip One Way

Amount : USD

Outbound

From: [Field]

To: [Field]

Date: [Field] Depart at [Field]

Comment: [Field]

Return

Date: [Field] Depart at [Field]

Comment: [Field]

Save Cancel

3

4

Save Button Cancel Button



For your **Air Ticket** costs, you need only enter the cost of the ticket into the **Amount** field. The **Outbound** and **Return** information will be added when you create your expense report.

Note: Click this link for instructions on [Estimating Airfare With Trip Search](#).

1

Round Trip/One Way

Round Trip One Way

The default for this option is **Round Trip**. If your trip involves multiple, individual legs, click **One Way** for this leg. Remember to add additional Air Ticket segments for each leg of your trip.

2

Airline Ticket Cost

[Field] USD

Enter the **Airline Ticket** cost in this field. To build in some flexibility for the cost, add an additional \$50.00 to the total airfare.

3

Save ButtonA rectangular button with a blue gradient background and the word "Save" in white text.

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

4

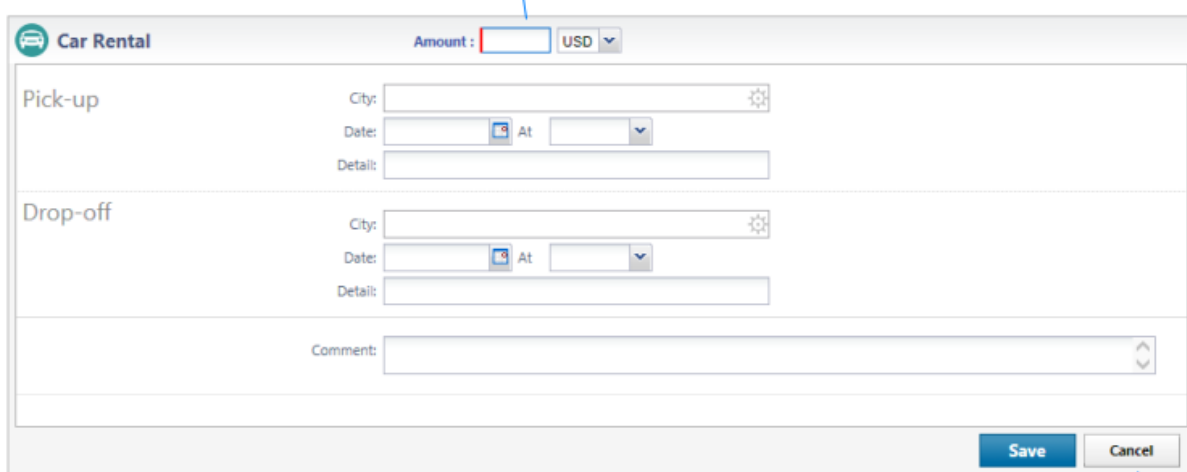
Cancel ButtonA rectangular button with a light gray background and a thin border, containing the word "Cancel" in black text.

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Car Rental Segment

Car Rental Amount

1



Car Rental

Amount : USD

Pick-up

City:

Date: At

Detail:

Drop-off

City:

Date: At

Detail:

Comment:

Save Cancel

2 Save Button

3 Cancel Button



For your **Car Rental** costs, you need only enter the cost of the car rental into the **Amount** field. The **Car Rental** information will be added when you create your expense report.

Note: Click this link for instructions on [Estimating Car Rental With Trip Search](#).

1

Car Rental Amount

Amount : USD

Enter the total **Car Rental** cost in this field. To build in some flexibility for the cost, add an additional \$50.00 to the total rental.

2

Save Button

Save

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3

Cancel Button

Cancel

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Hotel Reservation Segment

Hotel Reservation Cost

The screenshot shows a 'Hotel Reservation' form. At the top, there is a title bar with a back arrow, the text 'Hotel Reservation', and an 'Amount' field with a 'USD' dropdown. Below this are sections for 'Check-In' and 'Check-Out'. The 'Check-In' section includes fields for 'City', 'Date', and 'Detail'. The 'Check-Out' section includes a 'Date' field. At the bottom, there is a 'Comment' field and two buttons: 'Save' and 'Cancel'. Three blue callout circles are present: '1' points to the 'Amount' field, '2' points to the 'Save' button, and '3' points to the 'Cancel' button.



For your Hotel costs, you need only enter the cost of the ticket into the **Amount** field. The Hotel cost information will be added when you create your expense report.

Note: Click this link for instructions on [Estimating Hotel Reservation With Trip Search](#).

1 Hotel Reservation Cost

A close-up of the 'Amount' field from the form, showing a text input box and a 'USD' dropdown menu. A blue callout circle with the number '1' is positioned above the field.

Enter the total **Hotel Reservation** cost in this field. To build in some flexibility for the cost, add an additional \$50.00 to the total cost.

2 Save Button

A close-up of the 'Save' button from the form. A blue callout circle with the number '2' is positioned above the button.

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3 Cancel Button

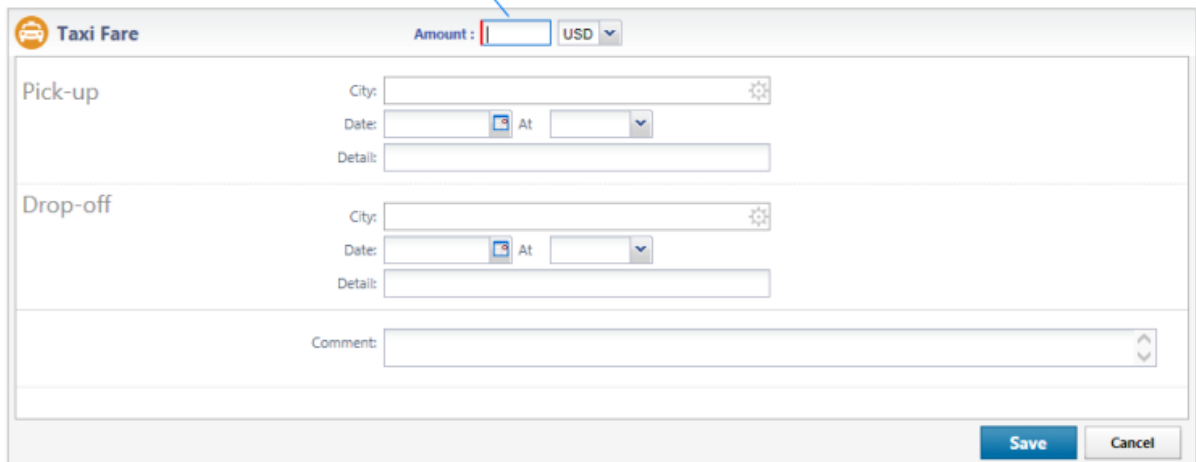
A close-up of the 'Cancel' button from the form. A blue callout circle with the number '3' is positioned above the button.

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Taxi Fare Segment

Amount

1



Amount : USD

Pick-up

City:

Date: At

Detail:

Drop-off

City:

Date: At

Detail:

Comment:

2 Save Button

3 Cancel Button



For your **Taxi Fare** costs, you need only enter the cost of the ticket into the **Amount** field. The **Taxi Fare** information will be added when you create your expense report.

Note: Click this link for instructions on [Estimating Taxi Fare With Trip Search](#).

1

Amount

Amount : USD

Enter the total **Taxi Fare** cost in this field.

2

Save Button

Save

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3

Cancel Button

Cancel

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Railway Ticket Segment

The screenshot shows the 'Railway Ticket' form. At the top, there are two radio buttons: 'Round Trip/One Way' (labeled 1) and 'Railway Ticket Amount' (labeled 2). Below these is the 'Amount' field with a 'USD' dropdown (labeled 2). The form is divided into 'Outbound' and 'Return' sections. The 'Outbound' section has fields for 'From:', 'To:', 'Date:', and 'Comment:'. The 'Return' section has fields for 'Date:' and 'Comment:'. At the bottom right, there are 'Save' (labeled 3) and 'Cancel' (labeled 4) buttons.



For your **Railway Ticket** costs, you need only enter the cost of the ticket into the **Amount** field. The **Outbound** and **Return** information will be added when you create your expense report.

Note: Click this link for instructions on [Estimating Railway Ticket With Trip Search](#).

1

Round Trip/One Way

The image shows a close-up of the radio buttons for 'Round Trip' (selected) and 'One Way'.

The default for this option is **Round Trip**. If your trip involves multiple, individual legs, click **One Way** for this leg. Remember to add additional Railway Ticket segments for each leg of your trip.

2

Railway Ticket Amount

The image shows a close-up of the 'Amount' field with a 'USD' dropdown menu.

Enter the **Railway Ticket** cost in this field. To build in some flexibility for the cost, add an additional \$50.00 to the total railfare.

3

Save Button

The image shows a close-up of the 'Save' button.

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

4

Cancel Button

A rectangular button with a light gray background and a thin border, containing the word "Cancel" in a dark gray font.

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Limousine Reservation Segment

Amount

1

Limousine Reservation

Amount : USD

Pick-up

City:

Date: At

Detail:

Drop-off

City:

Date: At

Detail:

Comment:

Save Cancel

2 Save Button

3 Cancel Button



For your **Limousine** costs, you need only enter the cost of the ticket into the **Amount** field. The **Limousine** information will be added when you create your expense report.

Note: Estimating costs for a limousine service must be done using a resource external to Concur, e.g. the internet or smart-device app.

1

Amount

Amount : USD

Enter the total **Limousine** cost in this field.

2

Save Button

Save

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3

Cancel Button

Cancel

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Parking Fee Segment

Amount

1

Save Button

Cancel Button

P For your **Parking Fee** costs, you need only enter the cost of the ticket into the **Amount** field. The **Parking Fee** information will be added when you create your expense report.

Note: Estimating costs for parking fees must be done using a resource external to Concur, e.g. the internet or smart-device app.

1 Amount

Amount : USD ▼

Enter the total **Parking Fee** cost in this field.

2 Save Button

Save

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3 Cancel Button

Cancel

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Dining Segment

Amount

1

2 Save Button

3 Cancel Button



For your **Dining** costs, you must use the U.S. General Services Administration's (GSA) Per Diem Rates table and guidelines established by WSU. This total is then entered into the **Amount** field. The **Dining** information will be added when you create your expense report.

See WSU's Administrative Policy and Procedure Manual, 7 Travel Expense Policies and Procedures (Effective 4/1/2012), [Section 7.2.4 Meals](#) for **WSU's Meal Allowance Adjustments** and a link to the GSA's **Per Diem Rate** table.

To estimate dining costs, see [Estimating Dining](#) in this guide.

1 Amount

Amount : USD ▼

In order to meet Internal Revenue Service (IRS) regulations, WSU uses a daily per diem rate for meals and incidental expenses. Calculate your per diem rate and enter the total in the Amount field. The number of meals per day varies based on your travel schedule and meals that may be provided as part of your travel event.

See sections [Fixed Allowances \(Per Diem\)](#) and [Meal Allowance Adjustments](#) in this manual to calculate the total dining cost.

2 Save Button

Save

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3

Cancel Button

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Miscellaneous Segment

The screenshot shows the 'Add Segment' form in the 'Segments' tab. A dropdown menu is open, listing 'Miscellaneous', 'Event', 'Air subscription', and 'Insurance'. Callouts 1-4 indicate the following elements:

- 1: The dropdown menu.
- 2: The icons for various expense types (airplane, train, car, hotel, car rental, coffee cup, magnifying glass, person, location pin).
- 3: The dropdown menu items.
- 4: The 'Insurance' option in the dropdown.



For your Miscellaneous costs, the fields of the segment layout will vary based on the type of expense you are entering. There are four categories of miscellaneous expenses:

- Miscellaneous
- Event
- Air Subscription
- Insurance

Note: Estimating costs for miscellaneous expenses must be done using a resource external to Concur, e.g. the internet or smart-device app.

1 Miscellaneous

Miscellaneous

Enter the total amount of this expense in the amount field. Enter a comment/description of the expense so that you will recognize the expense when you complete the Travel Expense Report. If you have more than one miscellaneous expense that fits this category, DO NOT total the expenses. Enter only one expense per segment. Insert as many additional Miscellaneous segments as necessary.

The screenshot shows the 'Miscellaneous' segment form. It includes an 'Amount' field with a USD dropdown, a 'Comment -Description of Expense (s):' text area, and 'Save' and 'Cancel' buttons.

2 Event

Event

Enter conference fees, event

Event Amount: USD

Start Date: At
Detail:

End Date: At
Comment:

3

Air Subscription

Air subscription

X

Air subscription Amount: USD

Comment -Description of Expense (s):

4

Insurance

Insurance

Travel Insurance fee for current travel.

Insurance Amount: USD

Comment -Description of Expense (s):

Visa Segment

The screenshot shows the 'Visa' segment form. Callout 1 points to the 'Amount' input field. Callout 2 points to the 'Save' button. Callout 3 points to the 'Cancel' button. The form includes a 'Comment -Description of Expense (s):' text area and a currency dropdown set to 'USD'.



For your **Visa** costs, you need only enter the cost of the ticket into the **Amount** field. The **Outbound** and **Return** information will be added when you create your expense report.

Note: Estimating costs for visa expenses must be done using a resource external to Concur, e.g. the internet or smart-device app.

1 Amount Field

A close-up of the 'Amount' field, showing a text input box followed by a dropdown menu currently set to 'USD'.

Enter the total **Visa** or **Passport** costs in this field.

2 Save Button

A close-up of the 'Save' button, which is a blue rectangular button with the text 'Save' in white.

Click the **Save** button to save this segment and prepare the **Segment** tab for additional expenses.

3 Cancel Button

A close-up of the 'Cancel' button, which is a light gray rectangular button with the text 'Cancel' in black.

If you have made an error, click the **Cancel** button, and the segment will not be save to the travel request. If you have saved a segment in error, you can delete it from the **Segment** tab.

Attach Supporting Documentation

Receipts and Supporting Documentation Overview

The University policy states that receipts are required for expenses over fifteen dollars except Fixed Meal and Personal Car Mileage expenses. (There are also built in Audits Rules for Business Purposes that require supporting documents to be uploaded.)

Concur offers a few options for uploading receipts and documents:

1. You can upload scanned images of your receipts as JPG, TIFF, PDF, PNG, or GIF files.
2. You can activate e-receipts that come directly from vendors. E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts.

Attaching Support Documentation to a Travel Request

This example provides the steps for adding an Event segment to a travel request and attaching a conference agenda to it.

1. With the travel request open, click the **Segments** tab, then click the **Miscellaneous** segment drop-down menu. From the menu, select **Event**.

The screenshot shows the 'Segments' tab in the Concur interface. Under the 'Add Segment' section, there is a row of icons representing different travel categories: Airplane, Train, Car, Hotel, Rental Car, Food/Beverage, Parking (P), and Miscellaneous. The 'Miscellaneous' icon is selected, and a dropdown menu is visible with the following options: Miscellaneous, Event (circled in red), Air subscription, and Insurance. Below the icons, there are input fields for 'From:', 'To:', 'Date:', and 'Comment:'.

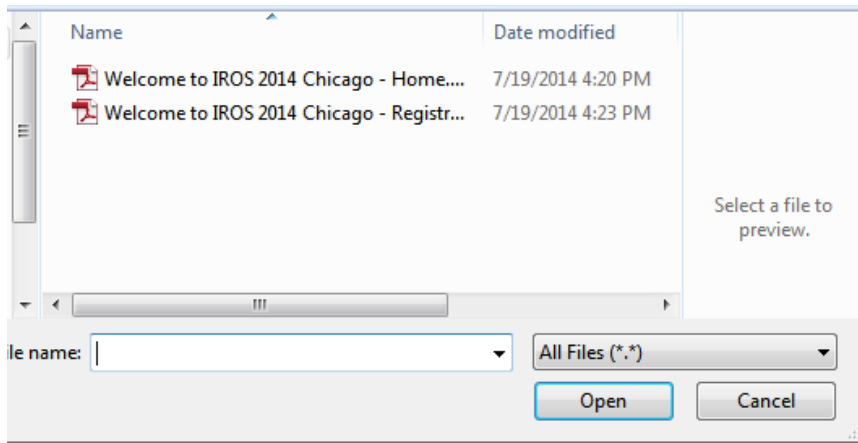
2. Enter the amount of the conference into the Amount field.

The screenshot shows the 'Event' segment form. At the top, there is a search icon and the word 'Event'. To the right, there is an 'Amount' field with a red border, followed by a 'USD' dropdown menu. Below this, there is a 'Start' section with 'Date:' and 'At' fields, and a 'Detail:' field with a red border.

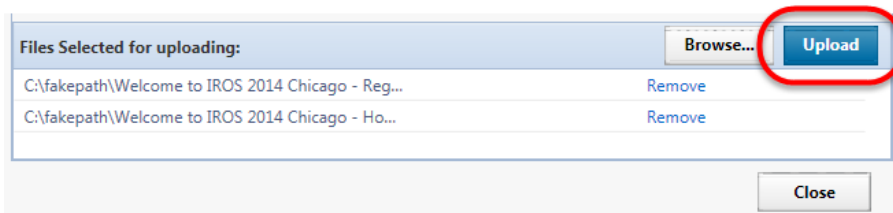
3. Click the **Attachments** button in the upper-right hand corner of the screen. When the drop-down menu displays, click the **Attach Documents** option. The **Document Upload and Attach** dialog box will display.

The screenshot shows the 'Attachments' dropdown menu in the Concur interface. The menu is open, showing options: Attachments (dropdown), Print / Email (dropdown), Delete Request, and Submit Request. Below these, there are two buttons: 'Check Documents' and 'Attach Documents' (circled in red). To the right, there is a 'Status: Not Submitted' and 'Amount: \$193.00'.

4. Click the **Browse** button to open the **Choose File to Upload** dialog box. Select a file to upload and click Open.



5. After selecting the document you want to upload (you can choose to attach up to 10 files to the request), click the **Upload** button on the dialog box.

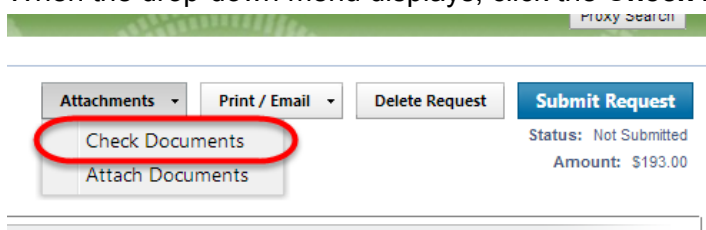


After the files have uploaded, click the **Close** button.

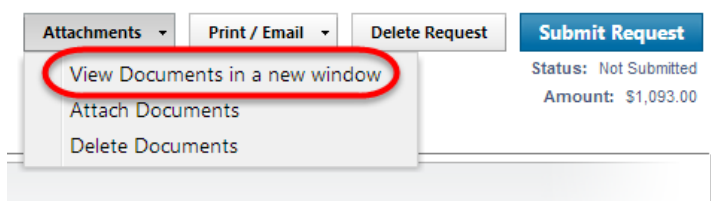
6. Enter the conference detail into the Detail field and click the Save button.

Note: This conference did not have a down-loadable registration form with fees. The registration file that was attached to this Event segment, was a PDF of the web page. To ensure the approver(s) had adequate information for approving travel to this conference, the URL address of the conference website was included in the Comments field.

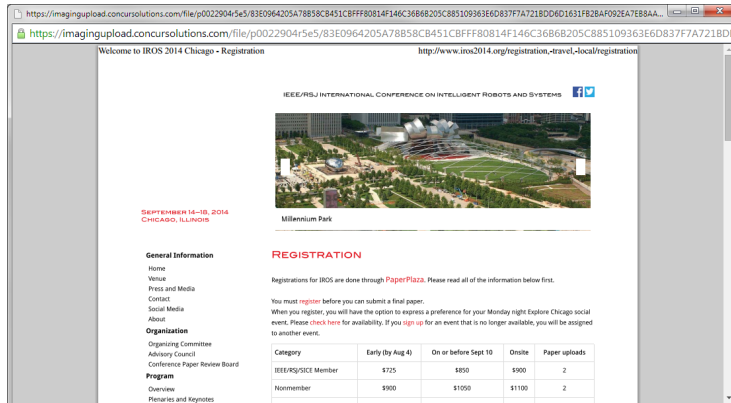
7. To view the attached document, click the **Attachments** button in the upper-right hand corner of the screen. When the drop-down menu displays, click the **Check Documents** option.



Clicking the **Check Documents** option after attaching a file will add the **View Documents in a new window** option to the **Attachments** drop-down menu.



8. Click the **View Documents in a new window** option to open the attached document(s) in a new window.



Note: Your browser interprets the opening of a new browser as a pop-up event. If the document does not open in a new window, you may have to allow pop-up for the Concur website. Contact your local IT technician for assistance in setting up your browser.

Adding an Approver to a Travel Request

Through TravelWayne, your immediate manager was systematically added as the approver for your travel requests. However, within your unit, the procedure may be to have other individuals within the unit act as second or third level approvers. If this is the case, you must manually add these approvers to the approval queue.

Adding a Next Approver to the Approval Flow

1. After opening the request, click the **Approval Flow** tab.

Request 3XEH Save Workflow Attachments Print / Email

Trip Title (Short Description): IROS Conference

Request Header Segments **Approval Flow** Audit Trail

Manager Approval:
Elms, Kimberly A. ⚙️ ⬇️ ⬆️ ✖️

2. Hover your mouse pointer over the first button. The screen tip reads, "**Add a step after this step.**" Click this button.

Manager Approval:
Elms, Kimberly A. ⚙️ ⬇️ ⬆️ ✖️

The **User-Added Approver** field is displayed.

Manager Approval:
Elms, Kimberly A. ⚙️ ⬆️ ✖️

User-Added Approver:
 ⚙️ ⬇️ ⬆️ ✖️

3. Click any where inside the **User-Added Approver** field and begin typing the last name of the Approver. When the approver's name appears, click it.

Manager Approval:
Elms, Kimberly A. ⚙️ ⬆️ ✖️

User-Added Approver:
Pendleton, Alicia D. (ac6543@wayne.edu) ✖️ ⬇️ ⬆️ ✖️

Pendleton, Alicia D. (ac6543@wayne.edu)
Employee ID: ac6543
Org Unit 2-Dept ID: Asst VP Human Resources/Office

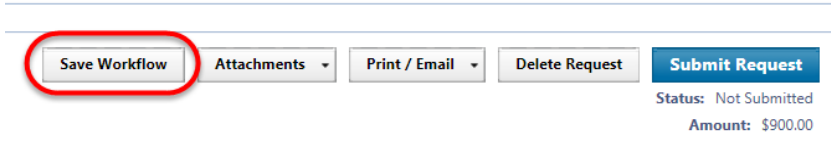
Search Approvers By ⬇️

The approver will be added to the Approval Flow.

Manager Approval:
Elms, Kimberly A. ⚙️ ⬆️ ✖️

User-Added Approver:
Pendleton, Alicia D. (ac6543@wayne.edu) ⚙️ ⬇️ ⬆️ ✖️

Click the **Save Workflow** button to save your edits and return to the travel request.



Save Workflow Attachments Print / Email Delete Request Submit Request

Status: Not Submitted
Amount: \$900.00

Note: The person you are selecting for addition to the **Approval Flow** must be in the system as a **Travel Request Approver**. If the person is not listed, you may need to complete the **Approver at Large** form and submit to Disbursements.

Adding an Approver Before the Current Approver

Adding an Approver before the current Approver follows the same procedure as above except for the selection of the insertion button. Hover your mouse pointer over the second button. The screen tip reads, "**Add a step before this step.**" Click this button and continue the procedure as described above.

Manager Approval:

TMatthews, TMichael

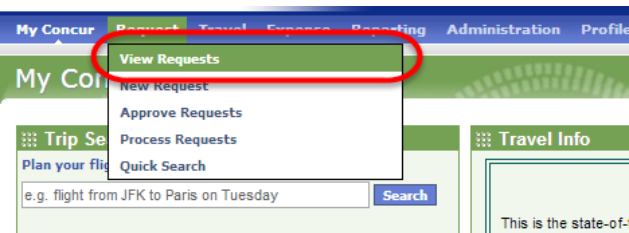


View a Not Submitted Travel Request

There will be times when you will start a travel request, but will have to close it without submitting it. From the **Concur** tab bar, you can open the **Active Requests** table which displays all of your active travel requests. You simply locate the travel request you want to view and select it. Here are instructions for opening a travel request that has not yet been submitted.

Open the Travel Request

1. Log into **Concur**. From the **My Concur** home page, click the **Request** tab. When the drop-down menu displays click **View Requests**. The **Active Requests** table will display.



2. Locate the travel request you want to review. Point to the name of the request in the **Request Name** column and click it. The request will open.

<input type="checkbox"/>	IROS Conference (02)	3XEF	Not Submitted	06/08/2014		\$2,786.00	\$0.00	\$0.00	
<input type="checkbox"/>	Copy of Testing Settings	3XM4	Approved	06/13/2014	07/03/2014	\$600.00	\$600.00	\$600.00	Expense

3. You can edit (add, delete or change) all components of a travel request that has not been submitted for approval.

Request 3XEF

Trip Title (Short Description): IROS Conference (02)

 A screenshot of the 'Request 3XEF' form. At the top, there are four tabs: 'Request Header', 'Segments', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is selected and circled in red. Below the tabs, there are two input fields: 'Destination' with the value 'Chicago' and 'Travel Type' with a dropdown menu showing 'Out of State Travel'.

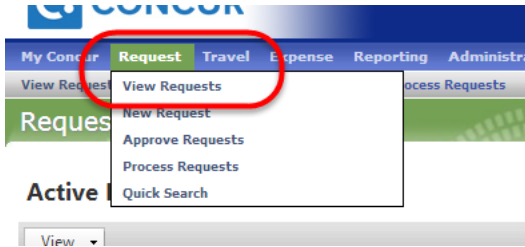
Note: After a travel request has been submitted, you cannot edit the components of the travel request. You can click the tabs to view the information, but you do not have the ability to add information and save it.

Copy, Delete, or Cancel a Request

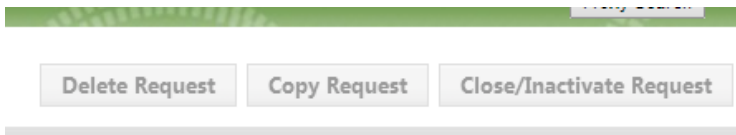
You can copy, delete or cancel a request before you submit it for approval. How you accomplish these tasks varies slightly.

Copy or Delete a Non-Approved Travel Request

1. After logging into **Concur**, click **Request** on the tab bar to display the drop-down menu, and click **View Requests**. The **Active Requests** table will display.



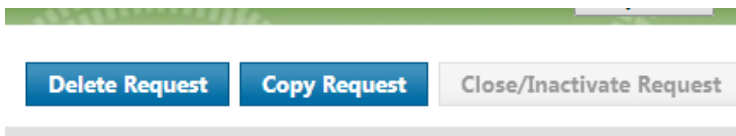
2. Notice the **Delete Request**, **Copy Request**, and **Close/Inactivate Request** buttons are disabled (they will not respond to a mouse click). Note: the Close/Inactivate Request button will be covered in another section.



3. Locate the travel request you want to copy or delete and check the check box to the right of the request.

			PROCESSOR
<input checked="" type="checkbox"/>	IROS Conference (02)	3XEF	Not Submitted
<input type="checkbox"/>	Copy of Testing Settings	3XM4	Approved

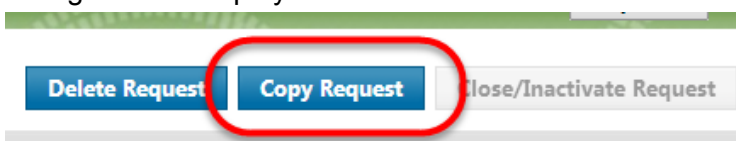
4. After checking the check box, look at the three buttons. The Delete Request and Copy Request buttons are now enabled.



Note: Once a travel request has been approved, you can no longer delete request.

Copying a Travel Request

1. After locating the request and clicking the check box, click the **Copy Request** button. The Copy Request dialog box will display.



2. The **Copy Request** dialog box offers several options for creating the new request.

- A. **Request Name** - The system created a default name for the new request. You have the option to change it.
- B. **Last Date of Source Request** - This is the date of return (last day of travel) for the original request.
- C. **Starting Date for New Request** - This date is the date of departure for the new travel request.
- D. **Segments** - If you leave the **Segments** box checked, the new request will contain exact copies of all the segments of the original request.
3. The copying process creates a new request with a new request number. The original request had a request number of **EXEF**. The new request can be edited as is required.

Deleting a Travel Request

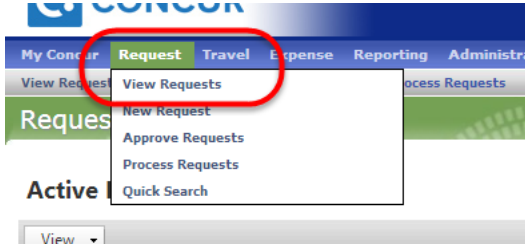
1. After locating the request and clicking the check box, click the **Delete Request** button. The **Confirm** deletion dialog box will display.

2. Click **Yes**, and the request will be deleted.

Canceling a Travel Request

To cancel a request, you must first open the request.

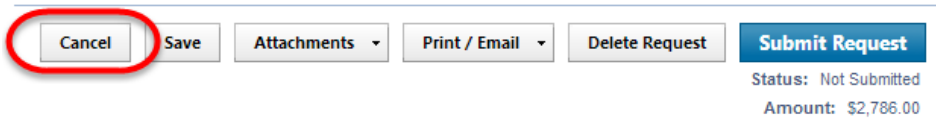
1. After logging into **Concur**, click **Request** on the tab bar to display the drop-down menu, and click **View Requests**. The **Active Requests** table will display.



2. Locate the travel request you want to cancel and click the request name in the **Request Name** column. The request will open.

<input type="checkbox"/>	IROS Conference (02)	3XEF	Not Submitted	06/08/2014		\$2,786.00	\$0.00	\$0.00	
<input type="checkbox"/>	Copy of Testing Settings	3XM4	Approved	09/01/2013	07/03/2014	\$600.00	\$600.00	\$600.00	Expense

3. From the action buttons in the upper-right hand corner of the request, click **Cancel**.

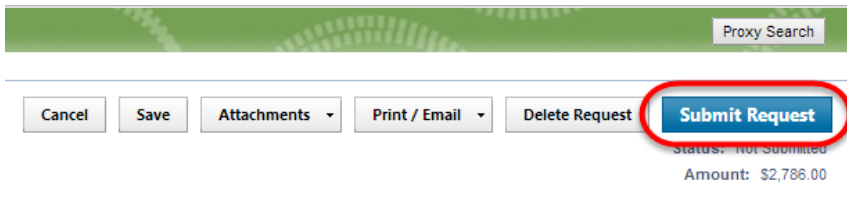


CAUTION: When you click the cancel button, you will **NOT BE** prompted to confirm the cancellation. The request will be removed from the system.

Submit a Travel Request for Approval

If you exited a travel request without submitting it for approval, you will need to open the travel request in order to submit it for approval. For assistance in opening a travel request, see section [View a Not Submitted Travel Request](#). Here are instructions for submitting a travel request for approval.

1. Open the travel request to be submitted.
2. Review the travel request one last time to ensure accuracy. If an approver finds inaccuracies in your travel request he or she will return it to you for correction. Obviously leading to a delay in the approval of your request.
3. When you are ready to submit the travel request for approval, click the **Submit** request button in the upper-right hand corner of the open request.

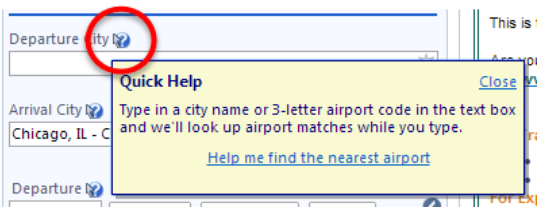


Section 4: Booking Your Travel

Once your travel request has been approved, you can book your travel. You have two options:

- Contact a [Conlin Travel](#) agent to book your travel.
- Book your own travel arrangements through Concur.

This section provides instruction for booking your own travel arrangements through Concur. If at any time you are unsure of what input is required by a field, click the question mark in the blue circle, and screen tip will display. Click **Close** link in the upper-right hand corner of the tip to close it.



Booking Your Airfare

Booking Your Airfare

1. In the **Trip Search** panel of your **My Concur** page, verify the **Air/Rail** tab is selected.

The screenshot shows the 'Trip Search' panel with the following elements:

- Header: Trip Search
- Text: Plan your flight, car and hotel:
- Input field: e.g. flight from JFK to Paris on Tuesday
- Search button
- Navigation tabs: Air/Rail (highlighted with a red circle), Car, Hotel, Taxi, Rail, Flight Status
- Radio buttons: Round Trip (selected), One Way, Multi-Segment

2. If this is a round trip airfare, make sure the **Round Trip** radio button is selected.

The screenshot shows the 'Trip Search' panel with the following elements:

- Header: Trip Search
- Text: Plan your flight, car and hotel:
- Input field: e.g. flight from JFK to Paris on Tuesday
- Search button
- Navigation tabs: Air/Rail, Car, Hotel, Taxi, Rail, Flight Status
- Radio buttons: Round Trip (selected and highlighted with a red circle), One Way, Multi-Segment

Note: **Round Trip** flights may involve one or more "stops." These stops are not "segments." They are stops in a single flight. **Multi-Segment** travel involves a *first* flight to Destination A, then a *second* flight to Destination B before a *third* flight returns you to your point of origin.

3. In the **Departure City** field, begin typing the name of the departure city. If there is more than one airport servicing the city, a list of airports will display. Select the appropriate airport by clicking on it.

The screenshot shows the 'Departure City' dropdown menu with the following elements:

- Input field: detro
- Dropdown list:
 - DTW Detroit Area Airports (Detroit, MI, United States of America)
 - DTW Detroit Wayne County Arpt (Detroit, MI, United States of America)
 - YIP Willow Run Arpt (Detroit, MI, United States of America)

The airport will display in the **Departure City** field.

The screenshot shows the 'Departure City' field with the following elements:

- Input field: Detroit, MI - Detroit Area Airports
- Links: Find an airport, Select multiple airports

4. Repeat the same process for the **Arrival City**.

The screenshot shows the 'Arrival City' dropdown menu with the following elements:

- Input field: MDW - Midway - Chicago, IL
- Dropdown list:
 - CHI Chicago Area Airports (Chicago, IL, United States of America)
 - MDW Midway (Chicago, IL, United States of America)
 - ORD O'Hare Intl Arpt (Chicago, IL, United States of America)

5. Click in the **Departure** date field. A calendar will open with the current date displayed. Use the navigation arrows to the left and right of the date to locate your departure date.

The departure date will be entered into the field.

6. Click the departure time field and a drop-down menu will display. Click the approximate time of your required departure.

The last field provides some control on the search parameters. The default is *plus* or *minus* 3 hours of the departure and return times. By clicking the field you can tighten or expand the search parameters.

Note: After selecting a departure date, the system automatically inserts a return date of *plus* one day.

7. Click the **Return** date field to display the calendar, then repeat steps 5 and 6 to enter the **Return** date and time of your trip.

8. Before clicking the **Search** button, you have the option of how you want the search results displayed: by price or by schedule. Sorting by **Price** is the default. If you would rather sort by schedule, click the **Schedule** radio button. Click **Search**.

Search flights by: Price Schedule
 Flights w/ no double connections:

At the top of the search results, is a summary of the search findings. The 3 diamonds under Delta and American Airlines indicate that these carriers are Wayne State preferred carriers.

Detroit, MI To Chicago, IL Sun, Sep 14 - Fri, Sep 19 Print / Email

Baggage Fee Policies Hide matrix

All 88 results	Delta 3 diamonds	American Airlines 3 diamonds	Amtrak Regional	Southwest	United	US Airways	Multiple Carriers	Airtran Air
Nonstop 80 results	174.89 19 results	178.00 20 results	68.00 2 results	193.00 3 results	235.00 6 results	292.00 16 results	338.00 14 results	--
1 stop 8 results	348.56 1 results	334.00 4 results	--	--	310.00 1 results	--	--	502.00 2 results

A list of air and rail fares appears below the summary. The list is sorted from the least expensive to the most expensive regardless of the departure and return times. The first two entries in this list are rail fares. The third and fourth entries begin the airfares.

Shop by Fares | Shop by Schedule | Sorted By: Price - Low to High

Expand All Details

Displaying: 88 out of 88 results. << Previous | Page: 1 of 9 | Next >> | All

Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$68.00	Amtrak Regional	Detroit... Chicago...	06:23 pm 12:50 pm	Chicago... Detroit...	10:57 pm 07:13 pm
				0	5h 34m
				0	5h 23m
Starting From: \$68.00	Amtrak Regional	Detroit... Chicago...	06:23 pm 07:20 am	Chicago... Detroit...	10:57 pm 02:04 pm
				0	5h 44m
				0	5h 44m
\$174.89	Delta	DTW ORD	03:30 pm 07:00 am	ORD DTW	03:47 pm 09:19 am
				0	1h 17m
				0	1h 19m
\$174.89	Delta	DTW ORD	03:45 pm 07:00 am	MDW DTW	04:02 pm 09:19 am
				0	1h 17m
				0	1h 19m

If you hover your mouse pointer over the green **Reserve** button, a screen tip appears informing you that this flight "conforms to your company (university) travel rules."

\$174.89	Delta	DTW ORD	03:30 pm 07:00 am	ORD DTW	03:47 pm 09:19 am
				0	1h 17m
				0	1h 19m

Reserve. \$174.89 This trip conforms to your company travel rules.

If the **Reserve** button is colored golden rod, the screen tip informs you that "This option breaks one or more company (university) travel rules." Booking a flight like this will require special justification to your approver.

\$334.00	American Airlines	DTW ORD	02:50 pm 07:30 am	ORD DTW	03:05 pm 04:55 pm
				0	1h 15m
				1	8h 25m

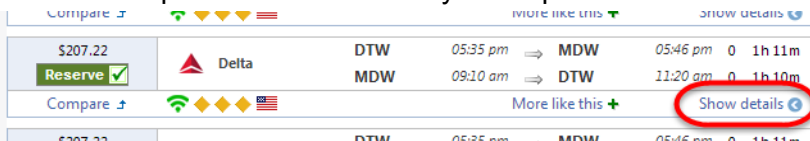
Reserve. \$334.00 This option breaks one or more company travel rules. We will log this choice if you choose to purchase it.

If the options on the first page of the search results do not meet your requirements, use the navigation controls at the bottom of the section to the next page.

Compare | More like this | Show details

Displaying: 88 out of 88 results. << Previous | Page: 1 of 9 | Next >> | All

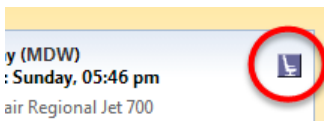
9. Locate the option that best meets your requirements and click the **Show Details** button.



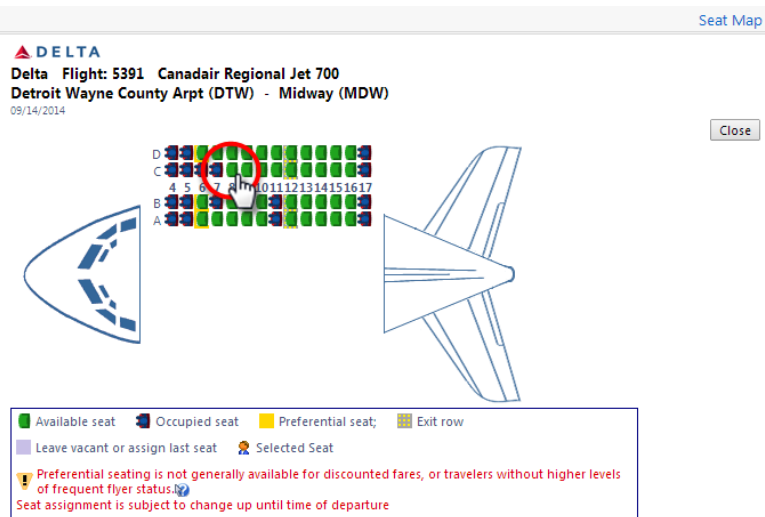
The airfare details will display. You see detailed flight information and fare rules.



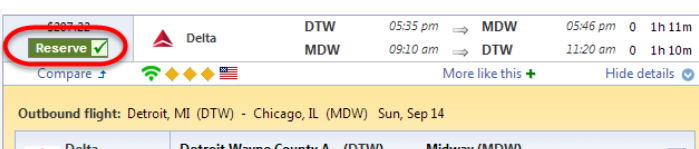
10. To select a seat on the **Departing** flight, click the **Seat Map** button to display the aircraft seating arrangement.



When the **Seat Map** displays, click the seat you want to reserve and click the **Select Seat** button. Once you have made your selection, click **Close**.



11. Repeat the process for the **Return** flight.
12. To book this airfare, click the **Reserve** button.



Booking Your Hotel

Booking Your Hotel

1. In the **Trip Search** panel of your **My Concur** page, verify the **Hotel** tab is selected.

The screenshot shows the 'Trip Search' panel. At the top, there is a search bar with the text 'Plan your flight, car and hotel:' and an example 'e.g. flight from JFK to Paris on Tuesday'. Below the search bar are several tabs: 'Air/Rail', 'Car', 'Hotel', 'Taxi', 'Rail', and 'Flight Status'. The 'Hotel' tab is highlighted with a red circle. Below the tabs are two input fields for 'Check-in Date' and 'Check-out Date'.

2. Enter the **Check-In Date** and the **Check-Out Date**.

This screenshot is a close-up of the 'Check-in Date' and 'Check-out Date' fields. The 'Hotel' tab is still selected. The two date input fields are circled in red. Below the date fields is a search radius field: 'Find hotels within 5 Distance Units miles of'.

3. The Hotel Search function uses one of three ways as a starting point to help locate your hotel:

- Reference Point/Zip Code
- Address
- Airport

Which one you choose will depend on what information you already know. If you are unfamiliar with your destination area but know the Zip Code, enter the Zip Code with the Reference Point/Zip Code option selected.

If you would like to find lodging near the destination airport, select the Airport option. If you know the hotel you want to use and know the address, select the Address option and enter the address in the appropriate fields.

Reference Point/Zip Code

1. With this option selected, enter your destination Zip Code in

The screenshot shows the 'Hotel Search' panel. At the top, there is a search radius field: 'Find hotels within 5 Distance Units miles of'. Below this are three radio button options: 'Airport', 'Address', and 'Reference Point / Zip Code'. The 'Reference Point / Zip Code' option is selected. Below the options is a text input field for the 'Reference Point / Zip Code' with the example text '(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')'. There are also checkboxes for 'With names containing:' and 'Add Another Hotel', and a 'Search' button at the bottom.

The airport will display in the **Departure City** field.

The screenshot shows the 'Departure City' field. The text 'Detroit, MI - Detroit Area Airports' is displayed in the field. Below the field are two links: 'Find an airport.' and 'Select multiple airports'.

2. Repeat the same process for the **Arrival City**.

3. Click in the **Departure** date field. A calendar will open with the current date displayed. Use the navigation arrows to the left and right of the date to locate your departure date.





The departure date will be entered into the field.

4. Click the departure time field and a drop-down menu will display. Click the approximate time of your required departure.

The last field provides some control on the search parameters. The default is *plus* or *minus* 3 hours of the departure and return times. By clicking the field you can tighten or expand the search parameters.

Note: After selecting a departure date, the system automatically inserts a return date of *plus* one day.

5. Click the **Return** date field to display the calendar, then repeat steps 3 and 4 to enter the **Return** date and time of your trip.

Departure 
 09/14/2014 depart 05:00 pm ± 3 
 Return 
 09/19/2014 depart 10:00 am ± 3 



6. Before clicking the **Search** button, you have the option of how you want the search results displayed: by price or by schedule. Sorting by **Price** is the default. If you would rather sort by schedule, click the **Schedule** radio button. Click **Search**.

Search flights by: Price Schedule
 Flights w/ no double connections:

At the top of the search results, is a summary of the search findings. The 3 diamonds under Delta and American Airlines indicate that these carriers are Wayne State *preferred* carriers.

Detroit, MI To Chicago, IL Sun, Sep 14 - Fri, Sep 19 Print / Email

[Baggage Fee Policies](#) [Hide matrix](#)























All results	Delta	American Airlines	Amtrak Regional	Southwest	United	US Airways	Multiple Carriers	Airtran Air
88 results								
Nonstop 80 results	174.89 19 results	178.00 20 results	68.00 2 results	193.00 3 results	235.00 6 results	292.00 16 results	338.00 14 results	--
1 stop 8 results	348.56 1 results	334.00 4 results	--	--	310.00 1 results	--	--	502.00 2 results

A list of air and rail fares appears below the summary. The list is sorted from the least expensive to the most expensive regardless of the departure and return times. The first two entries in this list are rail fares. The third and fourth entries begin the airfares.







Shop by Fares Shop by Schedule Sorted By: Price - Low to High

[Expand All Details](#)

Displaying: 88 out of 88 results. << Previous | Page: 1 of 9 | [Next >>](#) | [All](#)

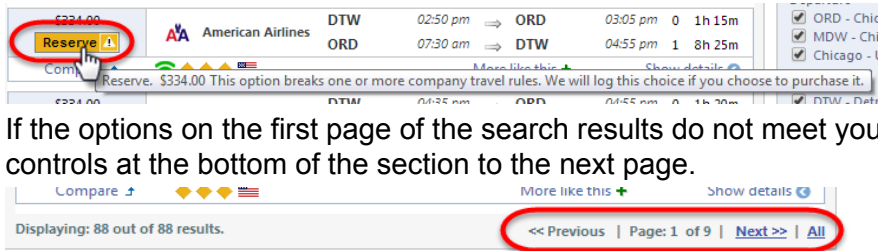
Price	Carrier	Depart	Arrive	Stops	Duration
Starting From: \$68.00 <input checked="" type="checkbox"/> Fares	 Amtrak Regional	Detroit... Chicago...	06:23 pm 12:50 pm	Chicago... Detroit...	10:57 pm 07:13 pm
Compare 		R	More like this 	Show fares 	
Starting From: \$68.00 <input checked="" type="checkbox"/> Fares	 Amtrak Regional	Detroit... Chicago...	06:23 pm 07:20 am	Chicago... Detroit...	10:57 pm 02:04 pm
Compare 		R	More like this 	Show fares 	
\$174.89 <input checked="" type="checkbox"/> Reserve	 Delta	DTW ORD	03:30 pm 07:00 am	ORD DTW	03:47 pm 09:19 am
Compare 	 		More like this 	Show details 	
\$174.89 <input checked="" type="checkbox"/> Reserve	 Delta	DTW ORD	03:45 pm 07:00 am	MDW DTW	04:02 pm 09:19 am
Compare 	 		More like this 	Show details 	

If you hover your mouse pointer over the green **Reserve** button, a screen tip appears informing you that this flight "conforms to your company (university) travel rules."

\$174.89 <input checked="" type="checkbox"/> Reserve	 Delta	DTW ORD	03:30 pm 07:00 am	ORD DTW	03:47 pm 09:19 am
Compare 	 		More like this 	Show details 	

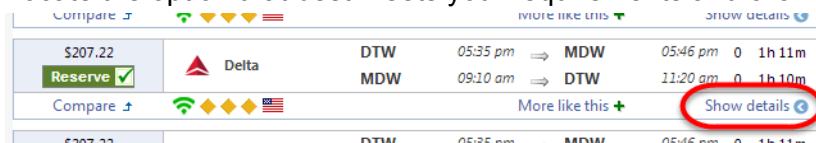
Reserve. \$174.89 This trip conforms to your company travel rules.

If the **Reserve** button is colored golden rod, the screen tip informs you that "This option breaks one or more company (university) travel rules." Booking a flight like this will require special justification to your approver.



If the options on the first page of the search results do not meet your requirements, use the navigation controls at the bottom of the section to the next page.

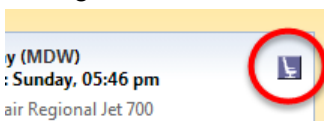
7. Locate the option that best meets your requirements and click the **Show Details** button.



The airfare details will display. You see detailed flight information and fare rules.



8. To select a seat on the **Departing** flight, click the **Seat Map** button to display the aircraft seating arrangement.



When the **Seat Map** displays, click the seat you want to reserve and click the **Select Seat** button. Once you have made your selection, click **Close**.

Seat Map

DELTA
Delta Flight: 5391 - Canadair Regional Jet 700
Detroit Wayne County Arpt (DTW) - Midway (MDW)
 09/14/2014

Close

Available seat
 Occupied seat
 Preferential seat
 Exit row
 Leave vacant or assign last seat
 Selected Seat

⚠ Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status.
 Seat assignment is subject to change up until time of departure

9. Repeat the process for the **Return** flight.

10. To book this airfare, click the **Reserve** button.

\$287.00 Delta DTW 05:35 pm → MDW 05:46 pm 0 1h 11m
 MDW 09:10 am → DTW 11:20 am 0 1h 10m
 Compare More like this Hide details

Outbound flight: Detroit, MI (DTW) - Chicago, IL (MDW) Sun, Sep 14

Delta Detroit Wayne County A... (DTW) Midway (MDW)

Booking Your Car Rental

Booking a Car Rental

1. Click the Car tab in the Trip Search panel.

The screenshot shows the 'Trip Search' panel with the text 'Plan your flight, car and hotel:' and a search input field containing 'e.g. flight from JFK to Paris on Tuesday' and a 'Search' button. Below the search field are several tabs: 'Air/Rail', 'Car', 'Hotel', 'Taxi', 'Rail', and 'Flight Status'. The 'Car' tab is highlighted with a red circle.

2. Click anywhere in the **Pick-up Date** field. Use the navigation arrows to the left and right of the current date to locate the desired **Pick-up Date**.

The screenshot shows the 'Pick-up date' field with a calendar for September 2014. The current date is 09/14/2014 at 12:00 pm. The calendar shows the days of the week (Su, M, Tu, W, Th, F, Sa) and the dates from 1 to 30. The date 14 is highlighted in yellow. The 'Drop-off date' field shows 09/15/2014 at 12:00 pm.

3. Using your arrival time, estimate the pickup time. Click in the **Pick-up Time** field to display the drop-down list of times and make your selection.

The screenshot shows the 'Pick-up date' field with a dropdown menu for 'Pick-up time'. The current date is 09/14/2014 and the current time is 05:30 pm. The dropdown menu lists times from 02:30 pm to 07:15 pm in 15-minute increments. The 'Drop-off date' field shows 09/15/2014 at 12:00 pm. The 'Pick-up car' field has a radio button for 'Airport' selected. The 'Return car' field has a checkbox for 'Return car'.

4. Repeat steps 2 and 3 to select the **Drop-off Date** and **Time**.

5. Click in the **Please Enter an Airport** field and begin typing the name of your destination airport. When the drop-down menu of destination airports displays, click your destination airport, then click the **Search** button.

Pick-up car at
 Airport Terminal Off-Airport
 Please enter an airport.
 Chicago, IL - Midway
 MDW Midway [Near CHI]
 Chicago, IL, United States of America
 ORD O'Hare Intl Arpt [Near CHI]
 Chicago, IL, United States of America
 Search

At the top of the search results, is a summary of the search findings. The 3 diamonds under Enterprise and National indicate that these carriers are Wayne State *preferred* carriers.

All 101 results	Mini Car	Economy Car	Compact Car	Intermediate Car	Standard Car	Standard Convertible	Full-size Car
Enterprise ◆◆◆	--	53.00	54.00	56.00	58.00	--	60.00
National ◆◆◆	--	55.00	57.00	58.00	62.00	--	62.00
Hertz	46.36	44.35	45.34	46.36	48.18	--	49.16
Avis	--	47.00	48.00	50.00	51.00	--	51.00

6. Locate the vehicle of choice, then click the **Reserve** button.

Economy Car (Worldspan) ◆◆◆ E-Receipt Enabled more info

\$53.00 per day
 (Corporate rate)
 Reserve ✓

Unlimited miles
 Pick-up: Terminal: MDW
 Automatic transmission
 Total cost **\$382.16***

Note: This search was generated from a 6-day trip. In the center column of the illustration above, the system calculated the total rental fee plus taxes and surcharge.

Section 5: Conducting Your Travel

Typically, travelers do not think about their expense reports until they are back in their office and it's time to do it. To some this is an incredibly painful experience. However, there are a few things you can do while traveling that can make the expense report experience a little (and in some cases) a lot less painful.

1. Use your WSU Travel Card for all your travel-related purchases. This will make entering expense items extremely easy.
2. Ask your vendors for electronic copies of your receipts. Many vendors offer to email your receipts to you. You can forward these receipts to Concur, and the receipts will be automatically uploaded to your Receipt Store.
3. When you receive paper receipts, use the smart-device app Concur's Expenselt to take a photograph of it with your device. These receipts will be automatically uploaded to your Receipt Store.
4. Make your purchases from vendors who offer E-Receipts. E-Receipts are uploaded into your Concur Receipt Store.

Section 6: Preparing Your Expense Report

To expense your travel, you must have an approved travel request. The steps below will help you to successfully complete and submit your travel request.

1. [Acting as a Delegate](#)
2. [Verifying Your Expense Profile](#)
3. [Starting an Expense Report](#)
4. [Creating a Trip Itinerary](#)
5. [Using a Trip Itinerary to Populate the Travel Allowance Itinerary](#)
6. [Using the Expense Center](#)
7. [Creating a Hotel Expense Entry](#)
8. [Assigning Travel Card Charges](#)
9. [Allocating Expense Entries](#)
10. [Attaching Receipts to an Expense Report](#)
11. [Faxing Receipts](#)
12. [Using the Receipt Store](#)
13. [Assigning Credit Card Charges to an Expense Report](#)
14. [Submitting an Expense Report for Approval](#)

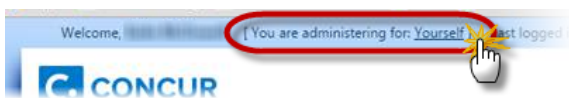
Acting as A Delegate

This section is for Delegates **ONLY**. If you are expensing your own travel, please skip this section and continue with [Verifying Your Expense Profile](#).

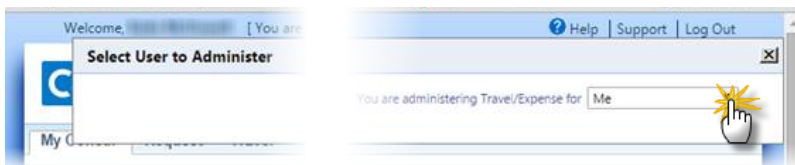
If you are a **delegate** and the person who is traveling has [assigned you as a delegate](#), the following steps will show you how to begin creating an expense report for that person.

After logging into Concur, follow these steps to begin creating an expense report for another person.

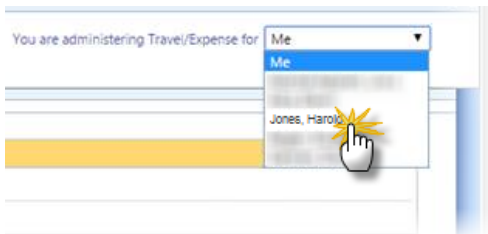
1. At the top of the Concur screen, you will see a link, **You are administering for Yourself**. Click the underlined word, **Yourself**.



2. When the Select User to Administer box displays, click in Me in the field **You are administering Travel/Expense for**. A drop-down list of individuals who have assigned you as their travel assistant will display.



3. Click the name of the person you want to create a travel request for.



4. You are now acting as this person's delegate. You are authorized to process expense reports for this person. You will process expense reports just as you would if the expense report was for yourself.
5. You will continue to act as this person's delegate until you repeat steps 1 through 3 above and select yourself, Me, or select another person to act as their delegate.

Important: As a travel assistant, you will NOT be able to process expense reports for the individuals you assist unless you have also been [assigned as their travel assistant](#).

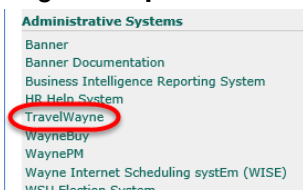
Verifying Your Expense Profile

To ensure timely reimbursement of your travel expenses, it is good practice to verify all elements of your Expense Profile are accurate. The sections requiring verification are:

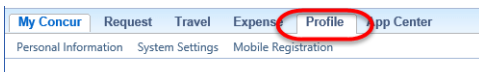
- [Expense Information](#) This section contains your home address, reimbursement currency, and the index your travel expenses will be allocated to. It is read-only. If any of the information is incorrect, you must contact your administrator to make changes.
- [Bank Information](#) The bank information in this section will enable WSU to reimburse you for out-of-pocket expenses through direct deposit. You must enter all of your banking information.
- [Expense Delegates](#) Expense Delegates are WSU employees that you can authorize to create expense reports. If you are an approver, you can authorize delegates to approve expense reports for you.
- [Expense Preferences](#) This section gives you control over which system-generated, travel emails you receive.
- [Expense Approvers](#) This section contains your default travel expense approver. If additional approvers are required for approving an expense report, they can be added on the expense report itself.
- [Favorite Attendees](#) There are some expense types within Concur that will prompt you for Attendee names. If you have these types of expenses combined with a regular set of individuals who appear as attendees, this section enables you to create a list of those attendee names that will function as a drop-down menu when the prompt appears.

To verify your Expense Profile:

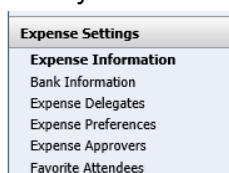
1. Log into **Pipeline**. In the **Employee Services** panel, click the **TravelWayne** link.



2. When **Concur** opens, click the **Profile** tab.



3. When the Profile page displays, locate Expense Settings in the My Profile panel on the left-side of the screen. Here you will find hyperlinks to all the Expense Settings requiring verification.



Expense Information

The screenshot shows the 'Expense Information' form with the following fields and callouts:

- 1**: Save Button
- 2**: Cancel Button
- 3**: Index
- 4**: Reimbursement Currency
- 5**: Cash Advance Balance
- 6**: Address (Home)
- 7**: City (Home)
- 8**: State (Home)
- 9**: Country (Home)
- 10**: Zip Code (Home)

The form contains the following fields:

- Save Button
- Cancel Button
- State/Province (dropdown menu, value: Select one)
- Reimbursement Currency (dropdown menu, value: US, Dollar)
- Cash Advance Balance (text input)
- Index (text input)
- Address (text input)
- City (text input)
- State/Province (text input, value: MI)
- Country (text input, value: US)
- Zip/Postal Code (text input)

This section contains your home address, reimbursement currency, and the index your travel expenses will be allocated to. It is read-only. If any of the information is incorrect, you must contact your administrator to make changes.

1 Save Button

Because this is a read-only section, the **Save** button is disabled.

2 Cancel Button

Because this is a read-only section, the **Cancel** button is disabled.

3 Index

This is the **Index** you travel expenses will be allocated to. If you are unsure of its accuracy, verify this index with your Business Affairs Officer.

4 Reimbursement Currency

This is the currency you will be reimbursed in for out-of-pocket travel expenses.

5 Cash Advance Balance

Cash Advance Balance

If you received a **Cash Advance** to cover travel expenses, this field contains the balance owed by you.

6 Address (Home)

Address

Your home street address.

7 City (Home)

City

Your home city.

8 State (Home)

State/Province

MI

The state or province you live in.

9 Country (Home)

Country

US

The country in which you live.

10 Zip Code (Home)

Zip/Postal Code

Your home Zip or Postal Code.

Bank Information

The screenshot shows the 'Bank Information' form with the following fields and callouts:


- 1** Bank Country: Dropdown menu showing 'UNITED STATES'.
- 2** Bank Currency: Text field showing 'US, Dollar'.
- 3** Routing Number: Text field with a red vertical bar on the left.
- 4** Bank Account Number: Text field with a red vertical bar on the left.
- 5** Re-Type Bank Account Number: Text field with a red vertical bar on the left.
- 6** Bank Name: Text field.
- 7** Branch Location: Text field.
- 8** Account Type: Dropdown menu showing 'Checking'.
- 9** Status: Dropdown menu showing 'Active'.
- 10** Active: Check box.
- 11** Save button: Blue button labeled 'Save'.

Below the form is an illustration of a check from 'Bank of Sometown' with the following details:

- Pay to the order of: _____ Dollars: _____
- Bank of Sometown
- Routing Number: 234123987
- Bank Account Number: 001234567891
- Check Number (Do not use): 1001

Below the check illustration is an 'Account History' table with the following columns:

Routing Number	Bank Account Number	Account Type	Activity	Description	Last Changed	Changed By

Remember: Red vertical bars along the left-side of a field () indicate required fields. The section **will not save** until all required fields contain data.

1 Bank Country

Bank Country
UNITED STATES

The country where your bank or financial institution is located.

2 Bank Currency

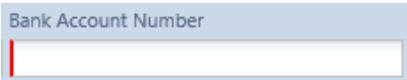
Bank Currency
US, Dollar

The currency your bank or financial institution operates with.

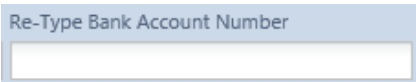
3 Routing Number

Routing Number

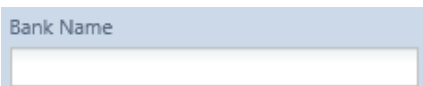
The routing number of your bank or financial institution. The illustration above shows the location your bank or financial institution routing number. This is a required field.

4 Bank Account NumberA text input field with a light blue header containing the label "Bank Account Number". The input area is empty.

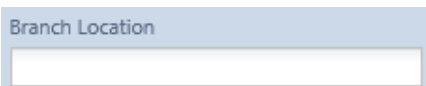
Your account number with your bank or financial institution. The illustration in the center of the graphic above shows you how to identify your bank or financial institution account number. This is a required field.

5 Re-Type Bank Account NumberA text input field with a light blue header containing the label "Re-Type Bank Account Number". The input area is empty.

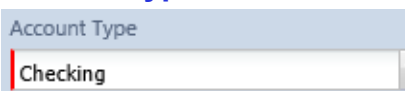
To confirm your account number, you are asked to retype it here.

6 Bank NameA text input field with a light blue header containing the label "Bank Name". The input area is empty.

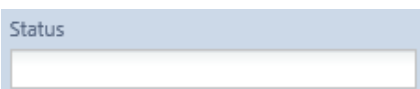
The name of your bank or financial institution.

7 Branch LocationA text input field with a light blue header containing the label "Branch Location". The input area is empty.

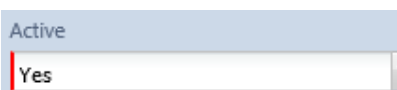
The location of your bank or financial institution.

8 Account TypeA dropdown menu with a light blue header containing the label "Account Type". The selected option is "Checking".

The type of account you have with your bank or financial institution. The default is **Checking**. If this account is a checking account, click the arrow for the drop-down menu and select **Savings** from the choices. This is a required field.

9 StatusA text input field with a light blue header containing the label "Status". The input area is empty and appears to be disabled.

Status is a disabled field.

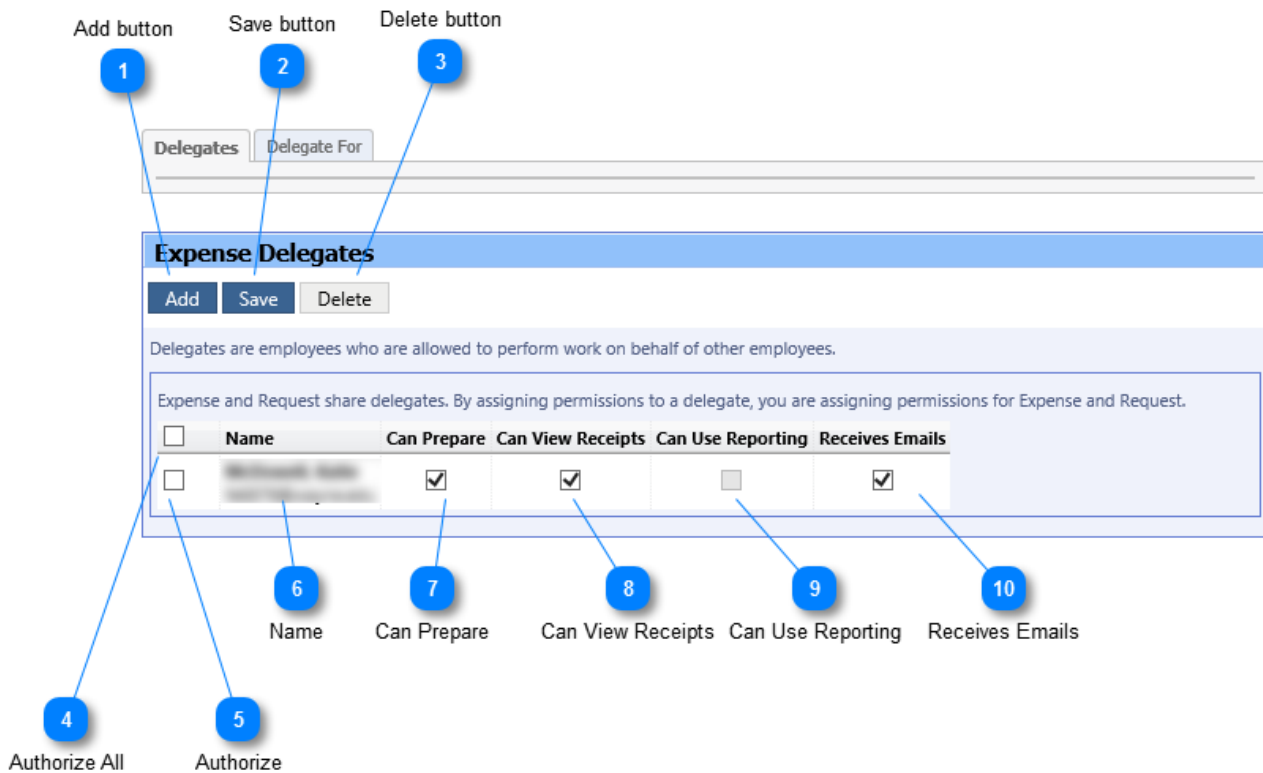
10 ActiveA dropdown menu with a light blue header containing the label "Active". The selected option is "Yes".

The status of your account. Active = Yes; Inactive = No. This is a required field.

11 Save buttonA blue rectangular button with the text "Save" in white.

If all required fields have been populated, click the **Save** button to save your entries.


Expense Delegates



Delegates are individuals you authorize to create and process your expense reports. During the initial setup for your department, there may have been one or more individuals assigned as potential delegates. If the person you want to act as your delegate is not listed, you can add that person in this section. Delegates can only be added if he/she is an active Concur account.

Delegates can:

- Create, edit and delete expense reports, notify you when the expense report is ready for submit, modify Expense Preferences, add and manage attendees.
- Submit Expense Reports for you.
- Submit Travel Requests for you.
- Attach, delete and view receipt images in receipt store.
- Receive all notifications relating to expense reports for you.

Remember: Red vertical bars along the left-side of a field () indicate required fields. The section **will not save** until all required fields contain data.

1 Add button

Add

If the person you want to act as your delegate for processing your expense reports is not listed, click the Add button to add them as a delegate.

1. Click anywhere in the Search field.

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or logon id

2. Begin typing the last name of the person you want to act as your delegate. A list of WSU employees with Concur accounts will appear. Select the person who will act as your delegate and click his/her entry. Click the **Add** button.

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or logon id

3. The person will be displayed in your list of delegates. You can select him/here and make assignments as necessary.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	[Name]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Name]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2

Save button

The **Save** button will save new delegates you have added or save changes to the permissions of existing delegates.

3

Delete button

The **Delete** button allows you to delete delegates from your list after you have checked the box to the left of his/her name.

4

Authorize All

The **Authorize All** check box enables you to select all the persons listed and authorize them to process expense reports for you.

5

Authorize

The **Authorize** check box enables you to select individual persons listed and authorize him/her to process expense reports for you.

6

Name



Name

Individual listed in the **Name** column are persons you can authorize to process expense reports for you.

7

Can Prepare



Can Prepare



By checking the **Can Prepare** check box, you are authorizing that delegate to create expense reports for you.

8

Can View Receipts



Can View Receipts



By checking the **Can View Receipts** check box, you are authorizing that delegate to view and attach receipts to your expense report.

9

Can Use Reporting



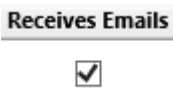
Can Use Reporting



Can Use Reporting is disabled.

10

Receives Emails

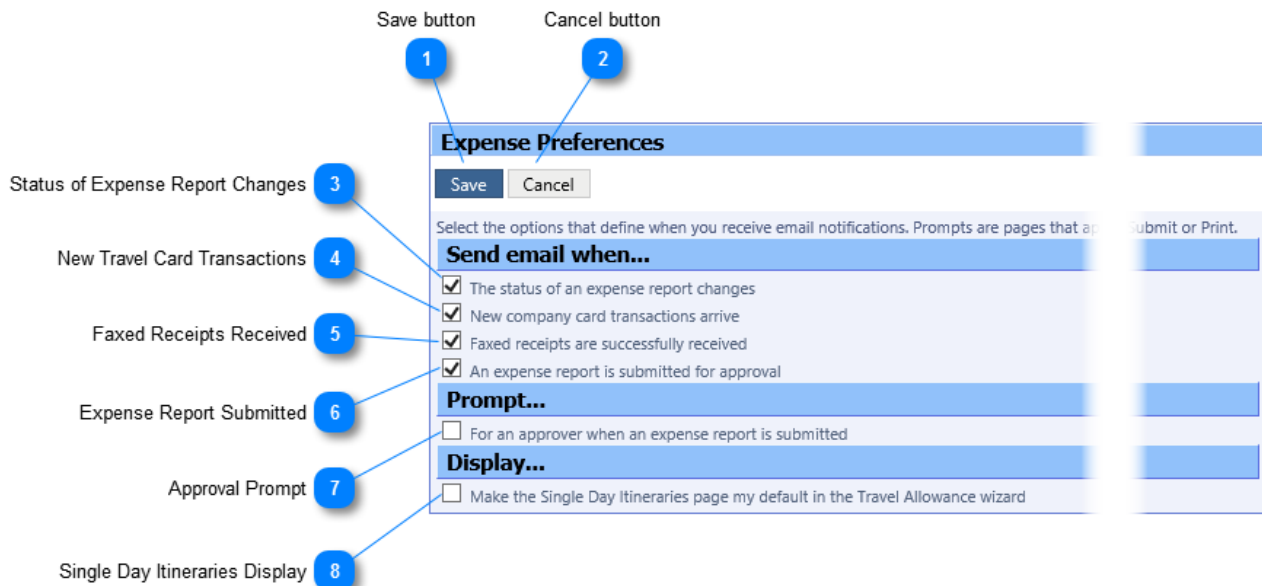


Receives Emails



By checking the **Receives Emails** check box, you are authorizing this delegate to receive your automatic travel emails originated by Concur.

Expense Preferences



Expense Preferences are automatic, system generated emails that inform travelers and approvers of certain events that occur during the expense reporting process.

1 Save button

The **Save** button saves changes you make to the **Expense Preferences** options.

2 Cancel button

The **Cancel** button cancels changes you make to the **Expense Preferences** options.

3 Status of Expense Report Changes



A check mark in this check box enables the delivery of emails notifying you of status changes to submitted expense reports. To turn off delivery of these emails, uncheck the box.

4 New Travel Card Transactions



A check mark in this check box enables the delivery of emails notifying you that charges to your Travel Card (transactions) are available for viewing with Concur. To turn off delivery of these emails, uncheck the box.

5 Faxed Receipts Received



A check mark in this check box enables the delivery of emails notifying you that receipts have been faxed into Concur and are available for viewing. To turn off delivery of these emails, uncheck the box.

6

Expense Report Submitted

A check mark in this check box enables the delivery of emails notifying you that your expense report has been submitted for approval. To turn off delivery of these emails, uncheck the box.

7

Approval Prompt

If you are an expense report approver, checking this box generate a prompt when an expense reports have been submitted and are pending you approval

8

Single Day Itineraries Display

Makes single-day itineraries page the default in the Travel Allowance wizard.

Expense Approvers

Save button Cancel button

1 2

Expense Approvers

Save Cancel

Default approver for your expense reports. Default approver 2 for your expense reports.

aa4934@wayne.edu - Kimberly Elms

3 4

Default Approver Default Approver 2

This section is disabled. No edits are allowed.

1 Save button

Save

Button is disabled.

2 Cancel button

Cancel

Button is disabled.

3 Default Approver

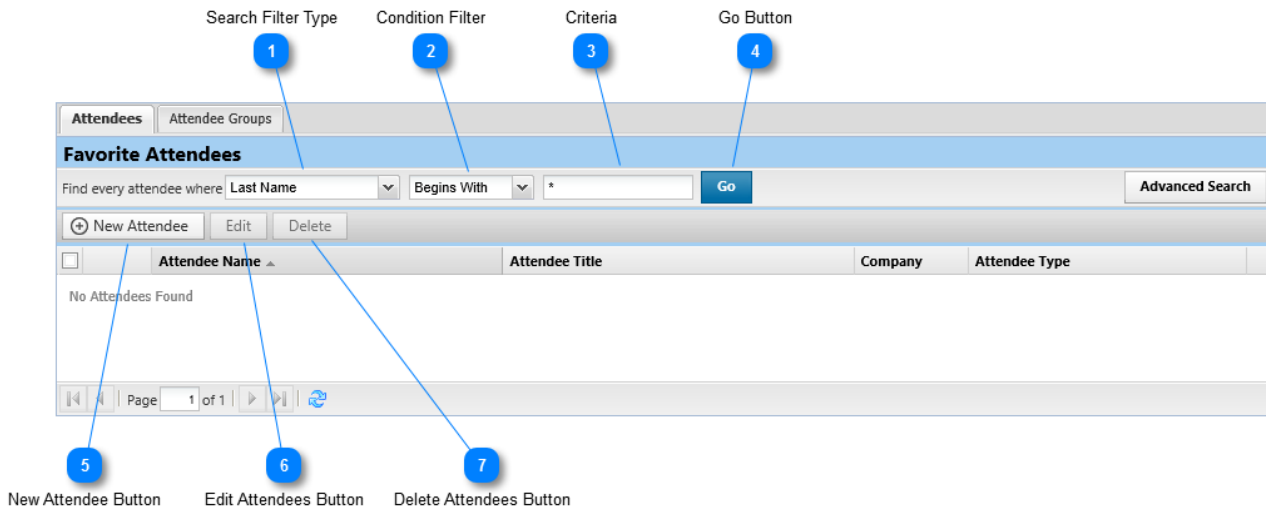
aa4934@wayne.edu - Kimberly Elms

Field is disabled.

4 Default Approver 2

This field is disabled.

Favorite Attendees



There are some expense types within Concur that will prompt you for Attendee names. If you have these types of expenses combined with a regular set of individuals who appear as attendees, this section enables you to create a list of those attendee names that will function as a drop-down menu when the prompt appears.

1 Search Filter Type

This field allows you control over how your search for attendees is processed.

2 Condition Filter

This filter defines the search criteria set by the First Search Filter.

3 Criteria

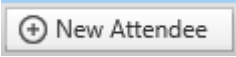
This is a date entry field. Here, you can enter the specific criteria set up by the **Search Filter** and the **Condition Filter**.

4 Go Button



The Go button initiates the search.

5 New Attendee Button



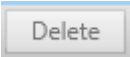
Add new Attendees.

6 Edit Attendees Button



Edit existing Attendees.

7 Delete Attendees Button

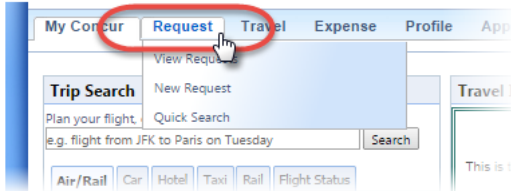


Delete existing Attendees.

Starting an Expense Report

After logging into Pipeline and clicking the **TravelWayne** link, complete the following steps.

1. Click **Request** on the **Concur** tab bar. The **Active Request Center** will display.



2. In the **Active Requests Center**, locate the travel request you want to create an expense report for and click the **Expense** link in the **Action** column for the request. A new expense report for this travel request will display.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remainin...	Action
<input type="checkbox"/>	IROS Conference	3X94	Approved	09/13/2014 09/19/2014	06/18/2014	\$3,107.00	\$3,107.00	\$3,107.00	Expense

3. Much of the information on the new expense auto-populates from the travel request. Verify this information is correct. Remember, the red vertical bars indicate these are required fields.

Create a New Expense Report

Report Header

Destination: Chicago | Travel Type: Out of State Travel | Trip Title (Short Description): IROS Conference | Business Purpose: Attend a conference

Date of Departure: 09/13/2014 | Date of Return: 09/19/2014

Travel Request ID Number: | Index: (121411) Engineering Office of the D | Trip Detailed Description: Attend International Conference on Intelligent R | Student Travel Award: No | Guest?: | Student?:

Accompanied By: | Report Date: 08/24/2014 | Comment: | Dept ID: Accounts Payable | Address: 5700 AAB | City: Detroit

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

Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/>	IROS Conference	3X94	No	\$3,107.00	\$3,107.00	\$3,107.00

Next >> | Cancel

4. When the new expense report is created, the **Travel Request ID Number** field is blank. You must enter the **Travel Request ID** into this field manually. The **Request ID** is located in the **Requests** section of the screen. In this example the **Request ID** is **3X94**.

Requests

<input type="checkbox"/>	Request Name	Request ID
<input type="checkbox"/>	IROS Conference	3X94

5. Type the **Request ID** into the **Travel Request ID Number** field.

Travel Request ID Number

3X94

6. Click **Next** in the lower right-hand corner of the **New Expense Report Header** screen. The **Itinerary Info** screen will display.



The next step, [Creating a Trip Itinerary](#).

Creating a Trip Itinerary

Outbound Leg Inbound Leg

1 3

New Itinerary Stop

Depart from (city)

Date

Time

Arrive in (city)

Date

Time

5 2 4

Next Button Save Button Save Button

Go to Single Day Itineraries Next >> Cancel

You will use this area of the Itinerary Info screen twice. The first time to enter the **outbound** leg of your trip, and the second time to enter the **inbound** leg of your trip.

1 Outbound Leg

Depart from (city)

Date

Time

Arrive in (city)

Date

Time

Enter the departure information (outbound leg) from you travel request. The information should be the **Departure From** city and the **Arrival In** city for the first day of travel. Note: The **Date** fields are for the first day of travel, *not* the duration of the trip.

2

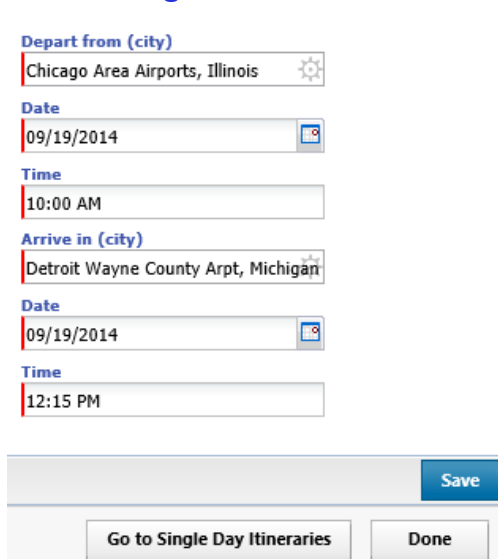
Save Button



Clicking the **Save** button the first time will save the outbound (departure) leg of your trip.

3

Inbound Leg



Enter the departure information (inbound leg) from you travel request. The information should be the **Departure From** city and the **Arrival In** city for the first day of travel. Note: The **Date** fields are for the last day of travel, *not* the duration of the trip.

4

Save Button



Clicking the Save button the second time will save the inbound (return) leg of you trip. Both legs will now appear on your itinerary.

<input type="checkbox"/>	Departure City ▲ ▼	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Detroit Wayne Count... 09/13/2014 04:00 PM	Chicago Area Airport... 09/13/2014 05:00 PM	COOK COUNTY, US-IL,...
<input type="checkbox"/>	Chicago Area Airport... 09/19/2014 10:00 AM	Detroit Wayne Count... 09/19/2014 12:15 PM	UNITED STATES

Click **Done**.

5

Next Button

Next >>

Click the **Next** button to display the **Available Itineraries** page.

The next step, [Using a Trip Itinerary to Populate the Travel Allowance](#).

Using a Trip Itinerary to Populate the Travel Allowance

Assigning Travel Allowances (meals and incidental expenses) to an expense is done through the Trip Itinerary. After the outbound and inbound portions (stops) have been created, you will have the opportunity to add the travel allowance adjustments.

During the planning phase of your trip, you calculated the allowable meals and per diem to enter the total on the Dining segment of your travel request. Once you verify the itinerary assignment and click Next, you will enter your travel allowance and adjustments. See section [Estimating Dining](#) for a review of how to calculate travel allowances and adjustments.

1. When the Expense & Adjustments screen displays, enter your adjusted meals by clicking the appropriate check boxes.

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provi...	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/13/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/14/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/15/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/16/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/17/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/18/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/19/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00

<< Previous Create Expenses Cancel

2. This itinerary was for a trip from Detroit to Chicago to attend an IROS Conference. The departing flight left Detroit at 4:00 p.m. The return flight arrived in Detroit at 12:15 p.m. Using the adjustment table below, you can adjust allowable meals based on outbound departure time and inbound arrival time. For this trip, allowable meals looks like this:

Outbound	Breakfast	Lunch	Dinner
Depart before 2:00pm		X	X
Depart after 2:00pm, before 8:00pm			X
Inbound	Breakfast	Lunch	Dinner
Arrive before 12:00pm	X		
Arrive between 12:00pm and 6:00pm	X	X	
Arrive after 6:00pm	X	X	X

3. To make your travel allowance adjustments on the expense report, check the boxes for the meals that are **DISALLOWED**.

Travel Allowances For Report: IROS2 Conference

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provi...	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/13/2014 Chicago, Illinois	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$41.00
<input type="checkbox"/>	09/14/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/15/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/16/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/17/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/18/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	09/19/2014 Chicago, Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$35.00

<< Previous Create Expenses Cancel

4. When you have completed the travel allowance adjustments, click **Create Expenses**.

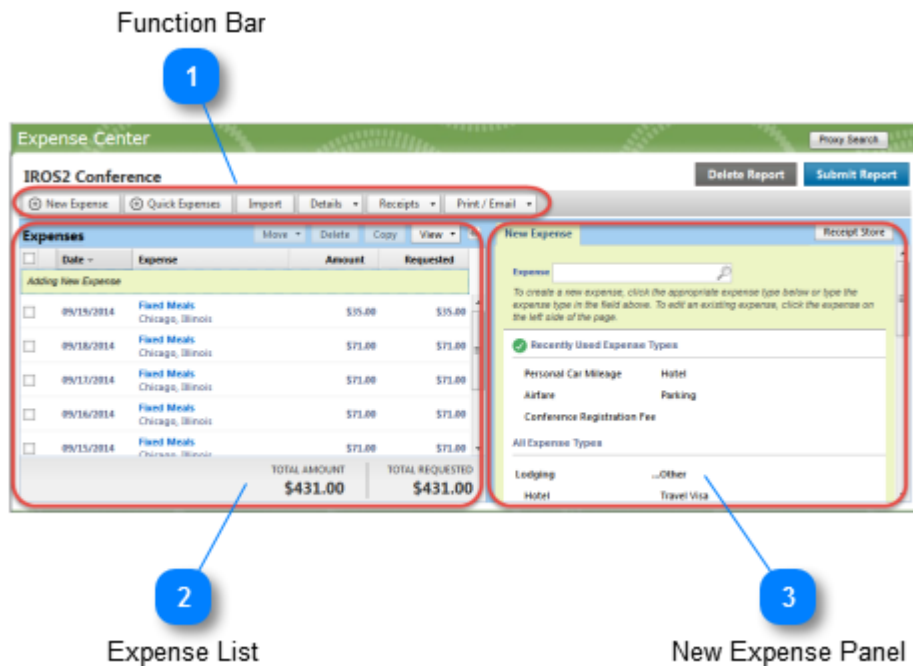
<< Previous **Create Expenses** Cancel

5. The allowable per diem has been added to your expense report.

Expenses Move Delete Copy View <<

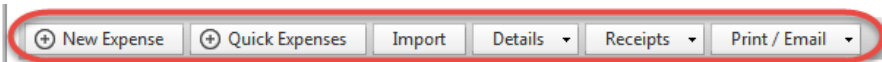
<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	09/19/2014	Fixed Meals Chicago, Illinois	\$35.00	\$35.00
<input type="checkbox"/>	09/18/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/17/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/16/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/15/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$431.00	\$431.00

Using the Expense Center



<TODO>: Insert description text here... And don't forget to add keyword for this topic

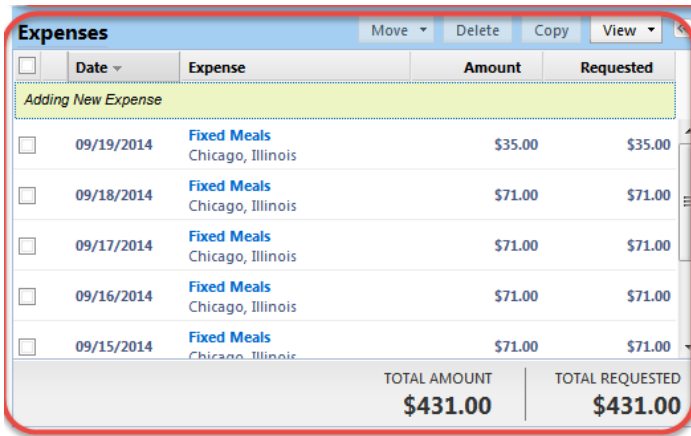
1 Function Bar



The following functions are available:

- | | |
|----------------|---|
| New Expense | Resets the New Expense Panel. |
| Quick Expenses | Displays a tabular screen for entering multiple expenses with minimal detail. |
| Import | Displays a list of all Travel Card and e-Receipt expenses that can be imported into the Expense List. |
| Details | Displays a drop-down menu of internal links to travel request and expense report related items for quick referencing. |
| Receipts | Displays a drop-down menu of internal links to expense receipt related options. |
| Print/Email | Displays WSU email options. |

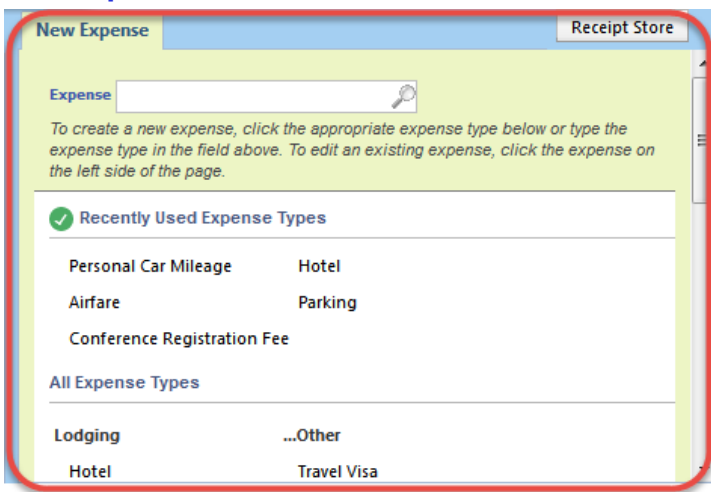
2 Expense List



	Date	Expense	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	09/19/2014	Fixed Meals Chicago, Illinois	\$35.00	\$35.00
<input type="checkbox"/>	09/18/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/17/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/16/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
<input type="checkbox"/>	09/15/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$431.00	\$431.00

As expenses are added to the expense report, they appear in the **Expense List** and the amounts are automatically totaled.

3 New Expense Panel



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.

Recently Used Expense Types

Personal Car Mileage	Hotel
Airfare	Parking
Conference Registration Fee	

All Expense Types

Lodging	...Other
Hotel	Travel Visa

Expenses that have not been charged to the Travel Card, your personal credit card, or for which there are no e-receipts are added to the expense report in the **New Expense** panel. Typical expense types are listed.

Creating a Hotel Expense Entry

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges and personal items. These expenses must be itemized so that they can be accounted for correctly. Lodging Itemization allows you to quickly itemize room rates and taxes, which are the same for each night of your stay. You can then itemize the remaining charges on your hotel bill.

Create a Lodging Expense

1. On the New Expense tab, select the Hotel expense type. You can accomplish this by entering hotel in the Search box at the top of the panel or click on the expense link in the panel itself. The appropriate fields will be displayed.

2. Complete the required fields (noted with a red line on the left side of the boxes.)
3. If the Travel Allowance box is checked, uncheck it. WSU is not using Per Diem for lodging.

4. Click **Itemize**.

5. The hotel expense appears on the left side of the page and the Nightly Lodging Expenses tab appears. Under the date for the Hotel entry, there is a red square icon with a white exclamation mark in it. This icon indicates there is an exception with this entry. Clicking the icon displays an on-screen message indication this entry requires itemization.

Date	Expense	Amount	Requested
09/19/2014	Chicago, Illinois	\$35.00	\$35.00
09/19/2014	Hotel Hilton Hotels, Chicago, Illinois	\$134.00	\$134.00

6. On the **Nightly Lodging Expenses** tab, use the calendar to select the **Check-in Date** and the **Check-out Date**. The **Number of Nights** is automatically calculated.

Expense: **Nightly Lodging Expenses** Receipt Store

Check-in Date: 09/14/2014 Check-out Date: 09/19/2014 Number of Nights: 5

Recurring Charges (each night)

Room Rate: 240.00 Room Tax: 28.00

Other Room Tax 1: 16.12 Other Room Tax 2: 6.48

Room rate and taxes will be shown as separate expenses

Save Itemizations Cancel

7. Enter the room rate, tax and other recurring charges.
8. Click **Save Itemizations**.

Save Itemizations Cancel

9. If there is a remaining amount to be itemized (For example, incidentals or room service), the remaining amount is displayed in the **Remaining** field.

Expense: **Nightly Lodging Expenses** Receipt Store

Total Amount: \$1,432.00 | Itemized: \$1,453.00 | Remaining: \$-21.00

Expense Type Transaction Date Business Purpose

10. Click the Add Itemization button.

Save Add Itemization Attach Receipt Cancel

11. Click the **Expense Type** dropdown and choose for example **Miscellaneous**.

Laundry
Meeting Room Fees
Miscellaneous
Other Supplies and Materials
Postage

12. The New Itemization page will appear; complete the required fields.

Total Amount: \$1,432.00 | Itemized: \$1,453.00 | Remaining: \$-21.00

Expense Type: Miscellaneous Transaction Date: 09/19/2014 Business Purpose: Mini Bar

Vendor Name: Hilton Hotels Payment Type: Cash Amount: 21.00 USD

Personal Expense (do not reimburse) Comment: Request: 09/21/2014, \$134.00 - IROS2 Con

Save Cancel

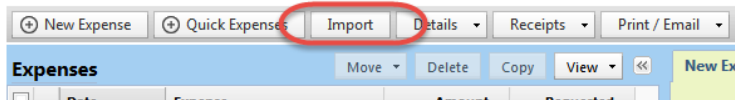
13. If the expense is a personal charge please click the box **Personal Expense (do not reimburse)**.

14. Click **Save**.
15. For each additional itemization, on the New Itemization tab, select the appropriate expense type and complete the appropriate fields.

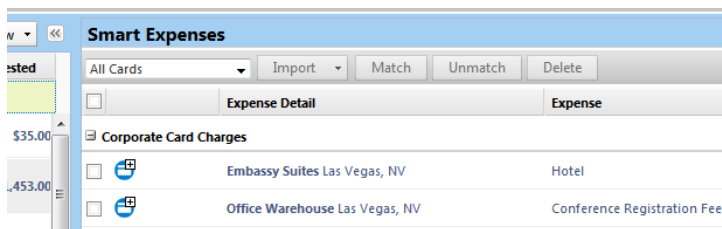
Assigning Travel Card Charges

Wherever possible, best practice is to use your WSU Travel Card for booking and charging trip expenses. In so doing, you can make entering expenses in your expense report easier and avoid the scanning and uploading of paper receipts. Unlike adding expenses manually using the New Expense panel, Travel Card expenses are imported into your travel expense.

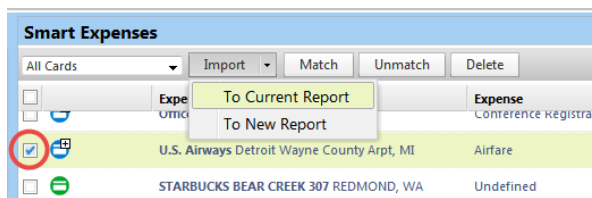
1. Click Import on the Functions tab bar.



2. The **New Expenses** panel is replaced by **Smart Expenses**.



3. Scroll down the list until you find the charge you are looking for. Click the check box to select it. Click **Import**, then **To Current Report**.



4. The **Travel Card** expense is inserted into the **Expense List**.

<input type="checkbox"/>	09/13/2014	Chicago, Illinois	\$41.00	\$41.00
<input type="checkbox"/>	07/19/2012	Airfare U.S. Airways, Detroit Wayne Cou	\$323.20	\$323.20
			TOTAL AMOUNT	TOTAL REQUESTED

5. To import additional Travel Card charges, repeat steps 1 through 3.

Allocating Expense Entries

After all expenses are listed in the Expense List, each expense must be allocated (applied) to the appropriate budget index.

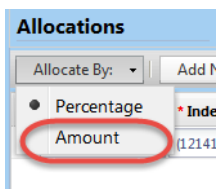
Verify or Add an Index

During the booking you may or may not have listed an index to charge the expense to. This step will verify an existing index or add on to this expense.

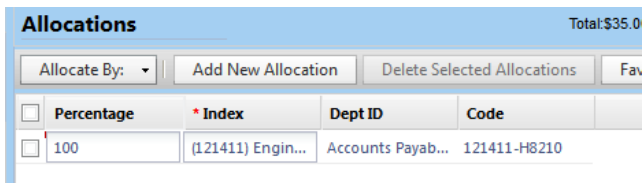
1. With the expense entry highlighted, click the **Allocate** button in the lower-right corner.



2. The default allocation method is by percentage, if you want to change the allocation method to dollar amount, click the **Allocate By** button.



3. If there is an existing index in the **Index** column, verify it is the correct index. If the **Index** column is blank, add the appropriate index.



4. Click **Save**.

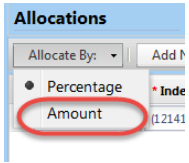
Splitting Costs Between Multiple Indexes

This process shows how to add additional index(es) for distributing expenses across multiple indexes.

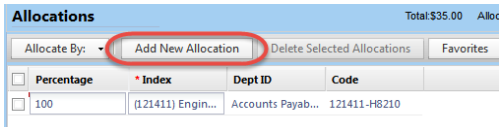
1. With the expense entry highlighted, click the **Allocate** button in the lower-right corner.



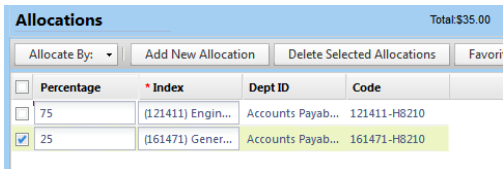
- The default allocation method is by percentage, if you want to change the allocation method to dollar amount, click the **Allocate By** button.



- Click the Add New Allocation button to add a new index.




- When the new allocation line displays, select the new index and adjust the allocations appropriately.

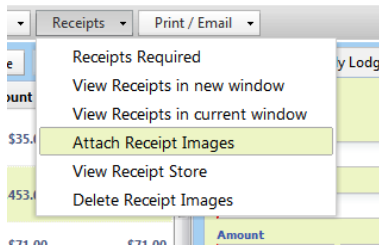


- Click **Save**, then click **Done**.

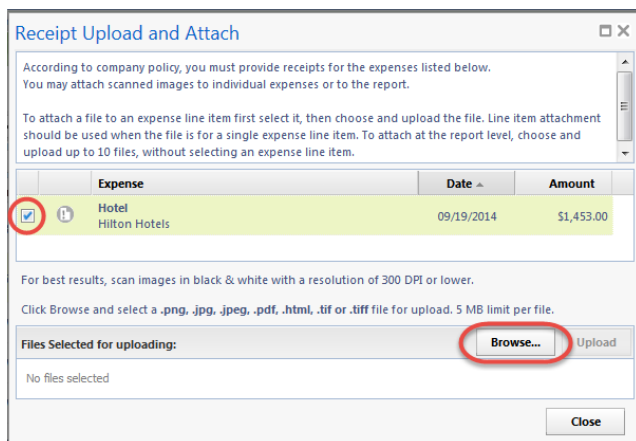
Attaching Receipts to an Expense Report

When this icon  appears next to an expense in the Expense List, you must attach an imaged copy of the receipt to the expense.

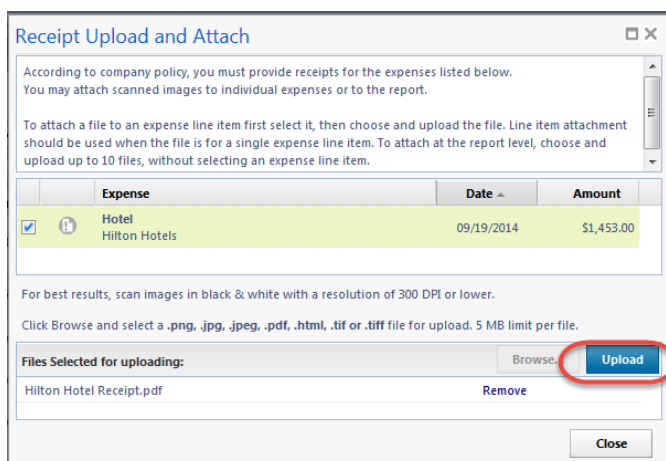
1. Click **Receipts** on the **Function** tab bar to display the drop-down menu. Click **Attach Receipt Images**.



2. When the **Receipt Upload and Attach** box displays, click the check box to select the expense item. Click **Browse** to find the location of the imaged receipt on your computer. Use standard Windows procedures to find and select the desired files.



3. Click the **Upload** button to attach the receipt to the expense item.



4. The receipt is now attached to the expense.

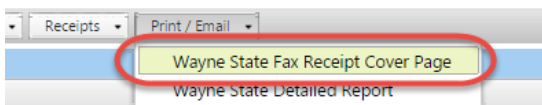
Faxing Receipts

Expense items like airfare, hotel, and parking, must have receipts attached to the expense report. If you have paper receipts for these items and do not have the means to image them for upload to Concur, you can fax copies of the receipts to a Concur fax number. The receipts will be automatically assigned to your Concur expense report. Faxed receipts will appear in the [Receipt Store](#).

1. Make copies of all your paper receipts that will be suitable for faxing.
2. Enter all your expense items for which you have paper receipts. An icon (shown in the image below) will appear under the date of each expense that requires an attached receipt. Items without the icon do not require receipts.

<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	09/19/2014	Hotel Hilton Hotels	\$1,440.00	\$1,440.00
<input type="checkbox"/>	09/19/2014	Car Rental Enterprise, Chicago, Illinois	\$324.00	\$324.00
<input type="checkbox"/>	09/18/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00

3. On the tab bar, click the **Print/Email** button when you are ready to fax your copied receipts. When the drop-down menu displays, click **Wayne State Fax Receipt Cover Page**.



ions cannot be saved. Please correct the transaction date.

4. A fax cover page will open either a new tab or a new browser. The expense items requiring receipts are listed under **Receipts to Fax**. The lower portion of the cover page contains detailed instructions for faxing your receipts to the Concur fax number.

P

FAX COVER PAGE

[\(see instructions below\)](#)

Fax this page and your receipts to:
866-428-9026

Report Summary

Report Name : IROS2 Conference
 Employee Name : Travel, Wayne
 Report Id : 09D6FCE82C894DF3B1FA
 Employee ID : Train0
 Company ID : 3DBC5
 Report Total : \$2,518.20
 Amount Due Employee : \$2,195.00
 Amount Due Company Card : \$323.20

Receipts to Fax

07/19/2012; Airfare; \$323.20;
 09/19/2014; Car Rental; \$324.00;
 09/19/2014; Hotel; \$1,440.00;

5. Select the expense items that you will be faxing the receipts for.

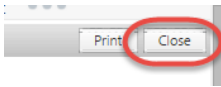
Receipts to Fax

07/19/2012; Airfare; \$323.20;
 09/19/2014; Car Rental; \$324.00;
 09/19/2014; Hotel; \$1,440.00;

6. Click the **Print** button in the upper-right hand corner of the screen.

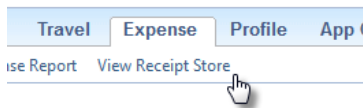


7. Click **Close** when finished.



8. Verify your faxed receipts have been uploaded into your **Receipt Store**.

9. On the Concur tab bar, click **Expense**. When the **Expense Center** opens, click **View Receipt Store**.

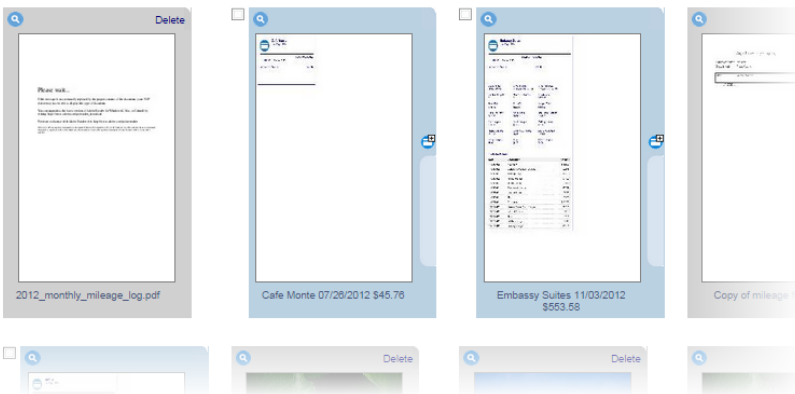


10. When the **Receipt Store** opens, verify your faxed receipts have been uploaded.

Receipt Store

This page shows all of the available receipts within Receipt Store and allows you to upload additional receipts. If you have Smart Receipts available you can add them to a new or existing expense report.

To attach receipt images to expense line items please visit Receipt Store within an expense report.



- Click the collapse button to close the **Receipt Store**.

Using the Receipt Store

The **Receipt Store** is the repository for all your travel-related receipts. The Receipt Store is populated several ways:

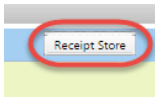
- Use the smart-device app Expenselt to photograph receipts and have them automatically uploaded to Concur.
- Use vendors who participate in Concur's E-Receipt program. Click this link, [E-Receipt Providers](#), to view a list of providers.
- Scan your paper receipts and upload them directly into the Receipt Store from your computer.
- Fax receipts to Concur. See section, [Faxing Receipts](#), for instructions and fax number for faxing receipts to Concur.
- Email receipts to Concur at MyInBox@concursolutions.com.

Once your receipts have been uploaded into **Receipt Store**, you simply drag-and-drop a selected receipt onto the associated expense item.

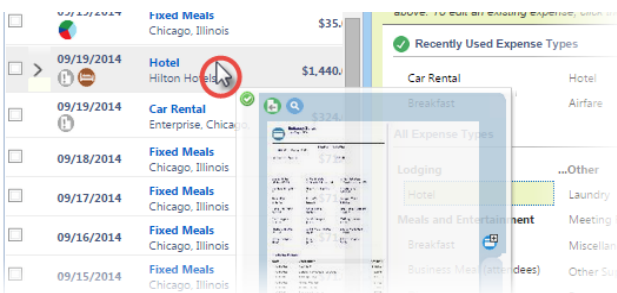
1. Open the expense report and identify expenses that require receipts.

<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	09/19/2014	Hotel Hilton Hotels	\$1,440.00	\$1,440.00
<input type="checkbox"/>	09/19/2014	Car Rental Enterprise, Chicago, Illinois	\$324.00	\$324.00
<input type="checkbox"/>	09/18/2014	Fixed Meals Chicago, Illinois	\$71.00	\$71.00

2. Click the **Receipt Store** button near the upper-right hand corner of the **Expense Center**.



3. When the **Receipt Store** opens, locate the appropriate receipt, point to it with your mouse pointer, click and hold your left mouse button, then drag-and-drop the receipt over the associated expense item.



4. If more than one expense item requires an attached receipt, continue repeat step 3 until all receipts have been attached.

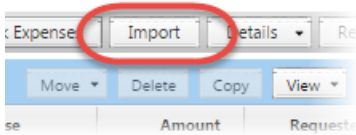
5. Click the **Collapse** button in the upper-right hand corner of the **Receipt Store** to close it.



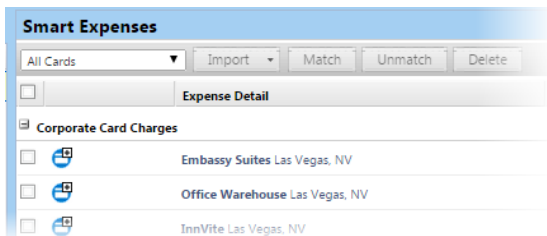
Assigning Credit Card Charges

If you have travel expenses that you have charged to your WSU Travel Card, you do not need to create the expense item first. You simply drag-and-drop the charge into the Expense List and the expense item will be created for you.

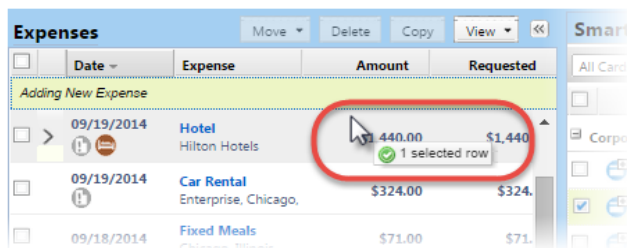
1. With your expense report open, click **Import** on the Expense tab bar.



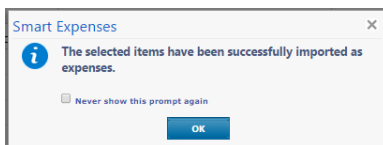
2. Your Travel Card charges will display in the **Smart Expenses** section to the left of your **Expense List**.



3. Locate the charge you want to assign to this expense report, then press and hold your left mouse button on the charge and drag-and-drop it any where into the **Expense List** section.



4. An Alert box will appear notifying you the item has been successfully imported. Click **OK**.



5. The expense item will be automatically created for you.



6. Expense items created by assigning **Travel Card** charges are created with the charge receipt attached to them. However, some charges, e.g. airfare, hotel, conference registration require additional documentation to support the expense. Example, in addition to the charge receipt (that was automatically attached to the expense item), a hotel expense item must also have an itemized receipt attached to it.

To see which expense types require additional documentation, see WSU Policy [7.1 Travel Expense Policies and Procedures](#).

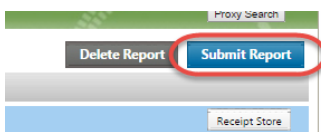
For instructions on attaching additional documentation to an expense item, see section [Attaching Receipts to an Expense Report](#).

Submit an Expense Report for Approval

Important: If you are acting as a **delegate** (*creating an expense report for someone else*), the system will not allow you to submit an expense report for approval. You must have the employee log into Concur and submit his/her own expense report.

If the employee is unfamiliar with Concur, you can provide the following steps to have him/her submit the expense report for approval.

1. When you are ready to submit your expense report for approval, click the Submit Report button near the upper-right hand corner of the expense report.



2. If you agree with the certification contained in the Final Review box, click Accept & Submit.

 A screenshot of a 'Final Review' dialog box. The title is 'Final Review'. Inside, there is a section titled 'User Submit' with the text: 'By clicking on the 'Accept & Submit' button, I certify that:'. Below this are four numbered certification points:

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.

 At the bottom of the dialog, there are two buttons: 'Accept & Submit' (highlighted with a red circle) and 'Cancel'.

3. If there are no exception on the expense report, the report will be successfully submitted for approval and the **Report Submit Status** message will display. Click **Close**.

 A screenshot of a 'Report Submit Status - IROS2 Conference' dialog box. The title is 'Report Submit Status - IROS2 Conference'. The main text says: 'This report was submitted successfully. Approver: TMatthews, TMichael'. Below this, there are three sections:

- Expense Report**

Report Total :	\$2,263.23
Less Personal Amount :	\$0.00
Amount Claimed :	\$2,263.23
Amount Rejected :	\$0.00
- Company Disbursements**

Amount Due Employee :	\$2,195.00
Amount Due TEST Corp Card :	\$68.23
Total Paid By Company :	\$2,263.23
- Employee Disbursements**

Amount Owed Company :	\$0.00
Total Owed By Employee :	\$0.00

 At the bottom right, there is a 'Close' button.