

# TRAVEL TIPS & CONCUR

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## Travel Tips

During this presentation, we will discuss what every traveler should know before they go on their trip.

We will discuss:

- Per diems
- Travel Documentation
- Combining personal with business travel

## Concur

We will also review who is required to use Concur.

- What modules to use and when?
- Who should allocate and when?
- Workflow

# COMMUNICATE WITH YOUR DEPARTMENT

- Do you need pre-approval to travel?
  - Are you lodging overnight?
  - Are you going to a country on the travel warning list?
- Will you submit actual meal receipts or claim per diem meals?
- What account will be used to reimburse your expenses?

# Review Per Diem Rates

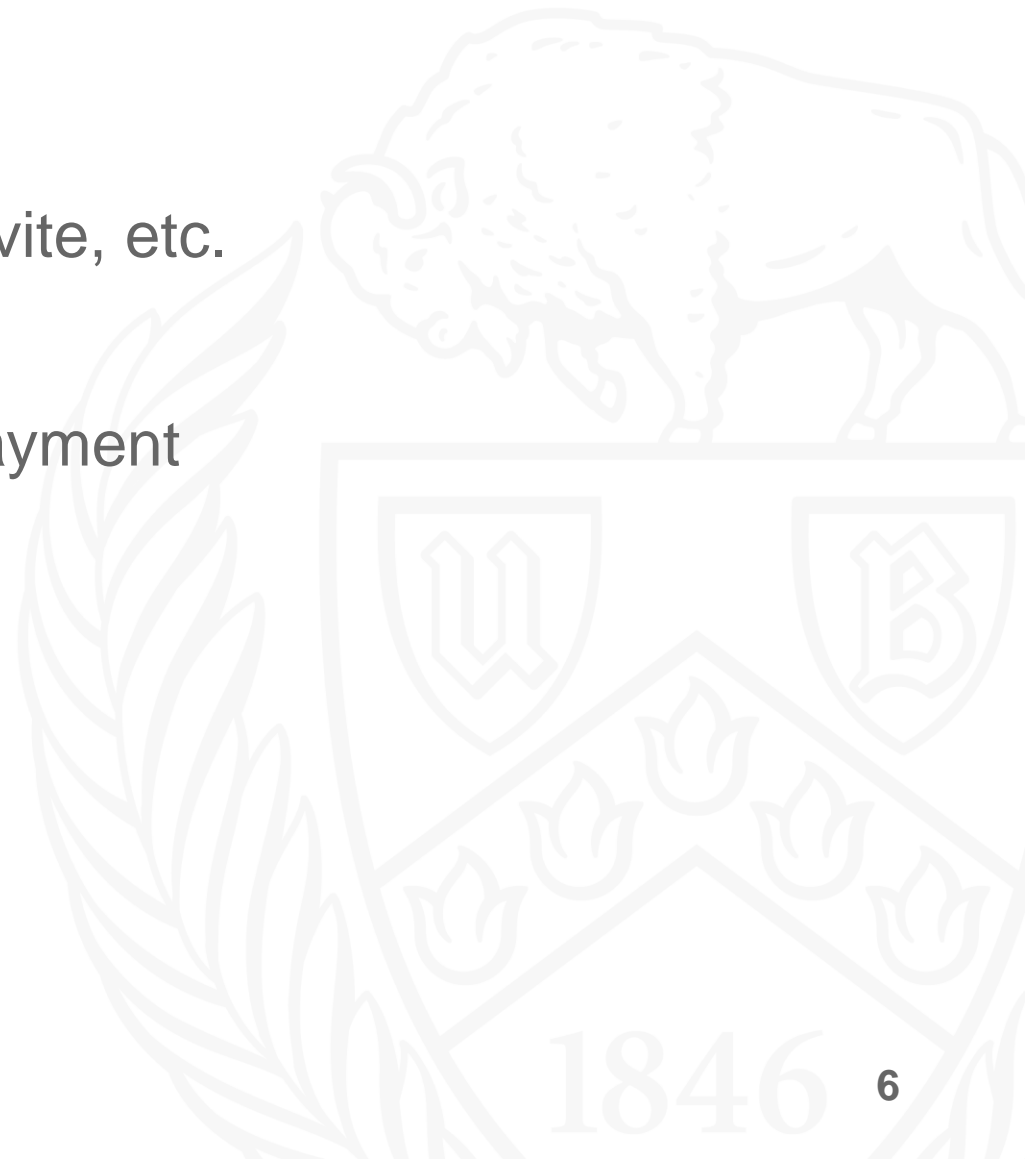
- Review the GSA Lodging and Meal Per Diem Rates
  - Go to [buffalo.edu/business-travel](https://buffalo.edu/business-travel)
  - In Quick Links on the [Traveling for Business](#) website, click Per Diem Rates
  - In Quick Links on the [Traveling for Business](#) website, click Per Diem Meal Allowances Breakdown
- Review the Lodging Per Diem Rates
  - Is the conference single room rate higher than the per diem rate?

# Guidelines for Per Diem Meals

- Follow 7:00 a.m to 7:00 p.m. Rule
  - Departure date
    - If you depart your home BEFORE 7:00 a.m. you are eligible for breakfast on that day.
  - Return date
    - If you return home AFTER 7:00 p.m. you are eligible for dinner on that day.
- No Reimbursement for Provided Meals
  - If you are provided a meal, you are not eligible for the per diem meal reimbursement.
- No Reimbursement for Lunch

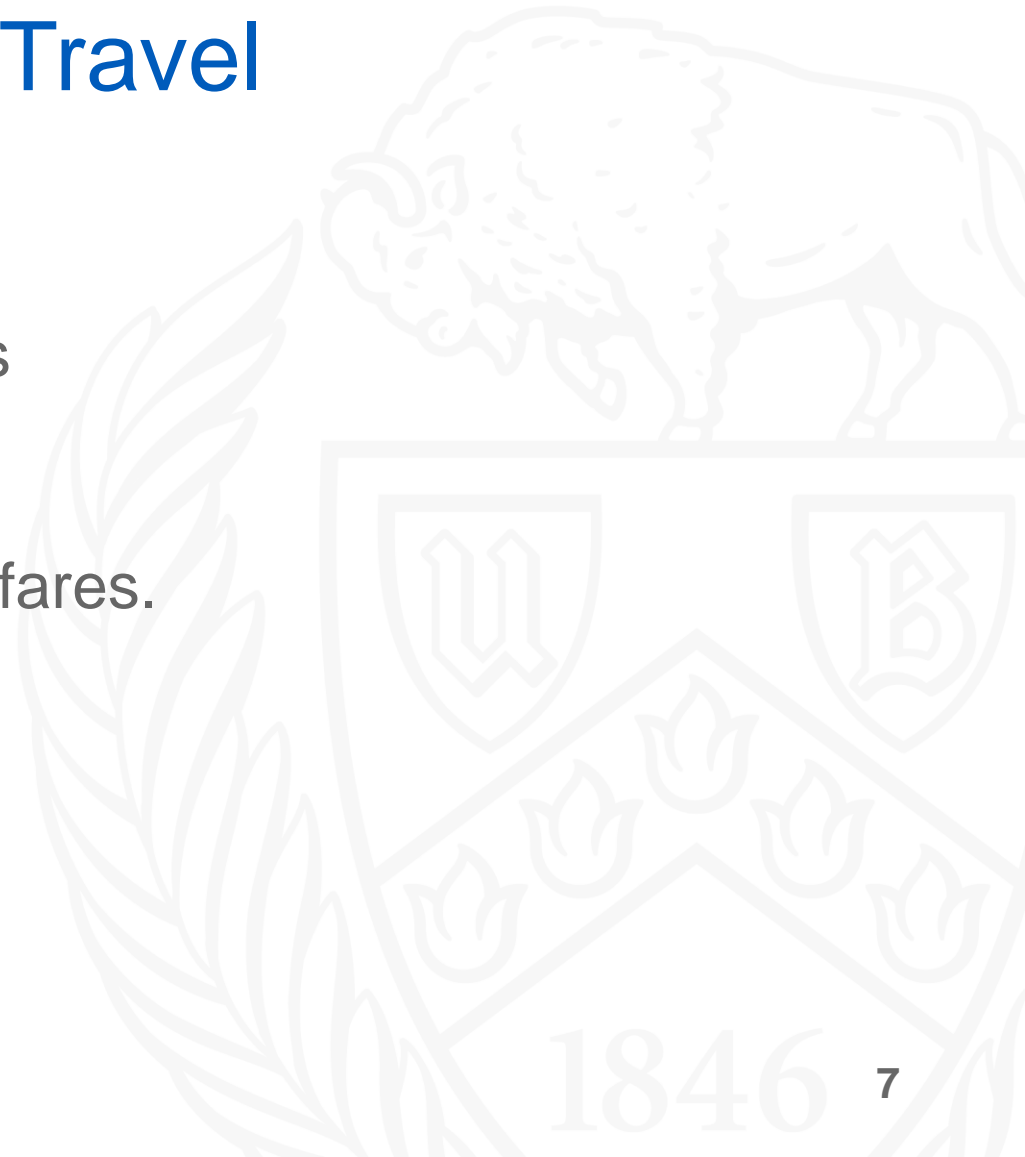
# Required Travel Documentation

- Purpose of Travel
  - Conference or meeting agenda, program, invite, etc.
- Flight Itinerary
  - Showing dates, times, fare class, proof of payment
- Conference Single Room Rate
- Itemized Lodging Bill
  - Showing zero balance
- Itemized Car Rental Receipt
- Taxi, Uber, Lyft Receipts
- Tolls and Parking Receipts



# Combining Personal & Business Travel

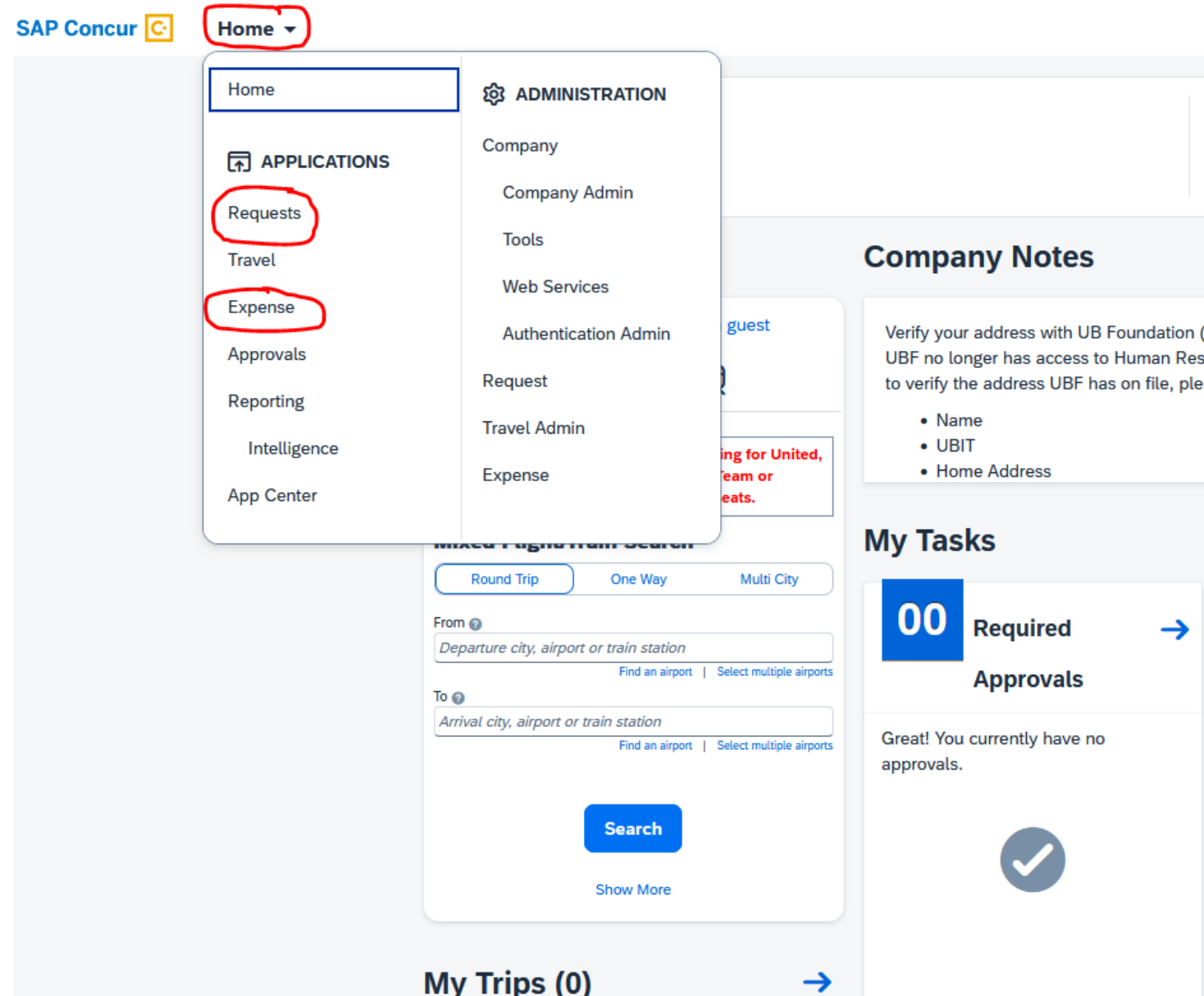
- Provide a Price Comparison
  - Flight itinerary containing UB business dates
  - Flight itinerary containing actual travel dates
  - You will be reimbursed the lesser of the two fares.



## Anyone who has an active appointment is required to use the Concur system

Submit Both Request and Expense Reports in Concur.

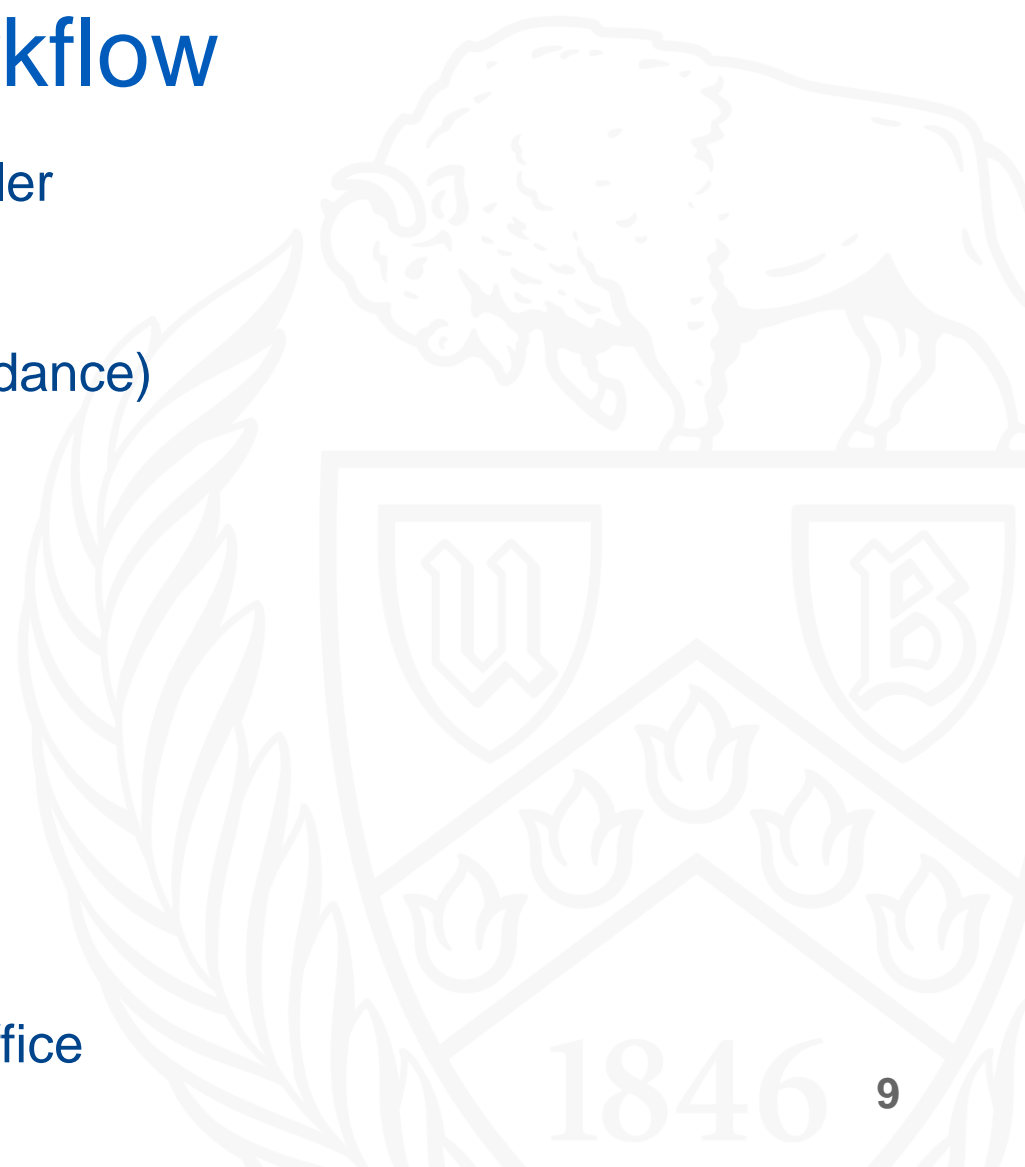
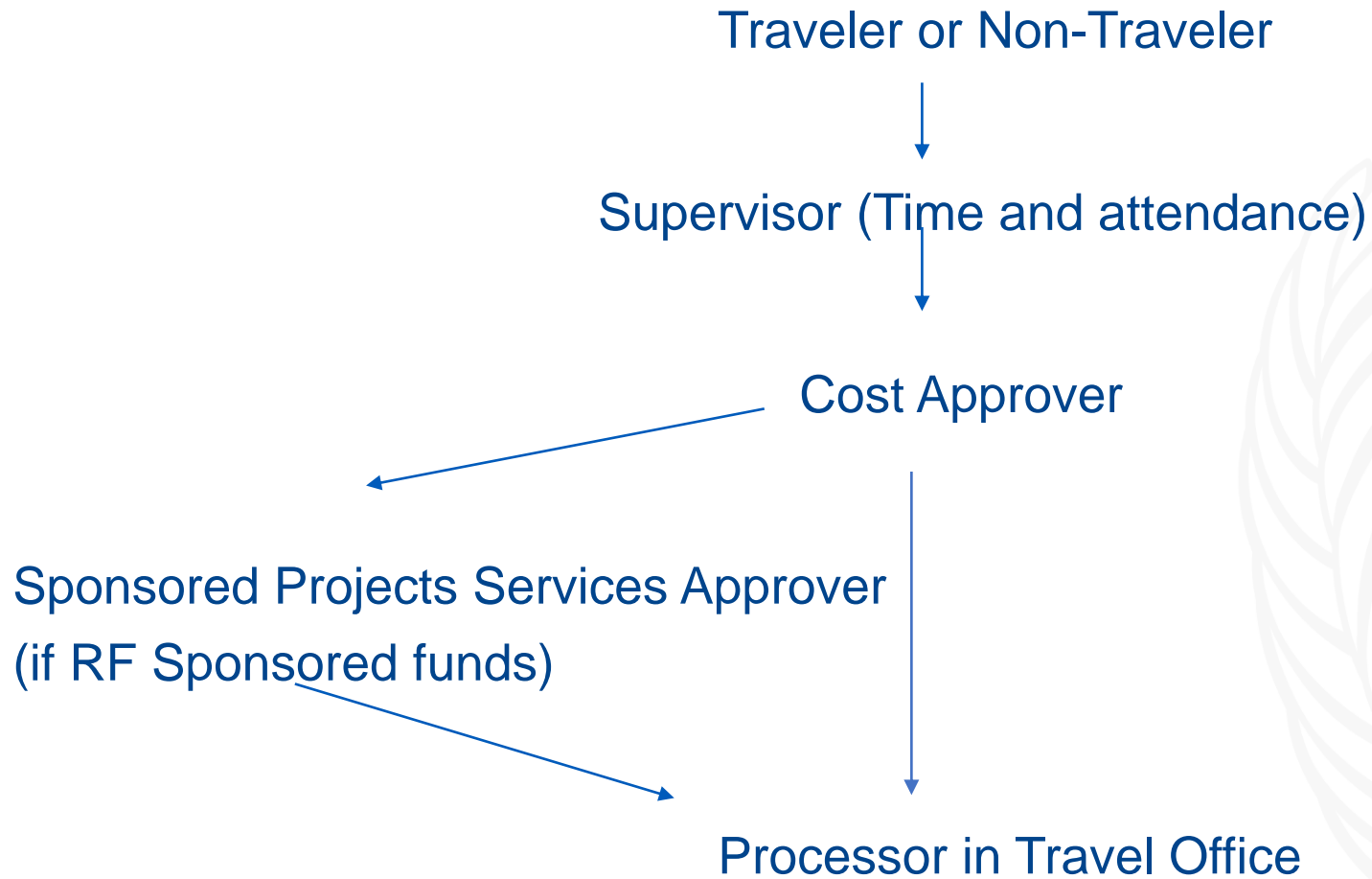
- Before your trip, create a request report for your pre-approval.
- When you return, create the expense report from your approved request.



The screenshot shows the SAP Concur Home page. At the top left, the SAP Concur logo is visible. The 'Home' dropdown menu is open, showing a list of navigation options. The 'Requests' and 'Expense' items are circled in red. The 'ADMINISTRATION' section includes links for Company, Company Admin, Tools, Web Services, Authentication Admin, Request, Travel Admin, and Expense. The 'APPLICATIONS' section includes links for Home, Requests, Travel, Expense, Approvals, Reporting, Intelligence, and App Center. Below the navigation menu, there is a search bar for flights with options for Round Trip, One Way, and Multi City. The search fields are labeled 'From' and 'To', with placeholder text 'Departure city, airport or train station' and 'Arrival city, airport or train station'. A 'Search' button is located below the search fields. To the right of the search bar, there is a 'Company Notes' section with a heading and a list of items to verify: Name, UBIT, and Home Address. Below the company notes is a 'My Tasks' section with a heading and a task card showing '00 Required Approvals' with a blue arrow pointing right. Below the task card, there is a message: 'Great! You currently have no approvals.' and a checkmark icon. At the bottom of the page, there is a 'My Trips (0)' section with a blue arrow pointing right.



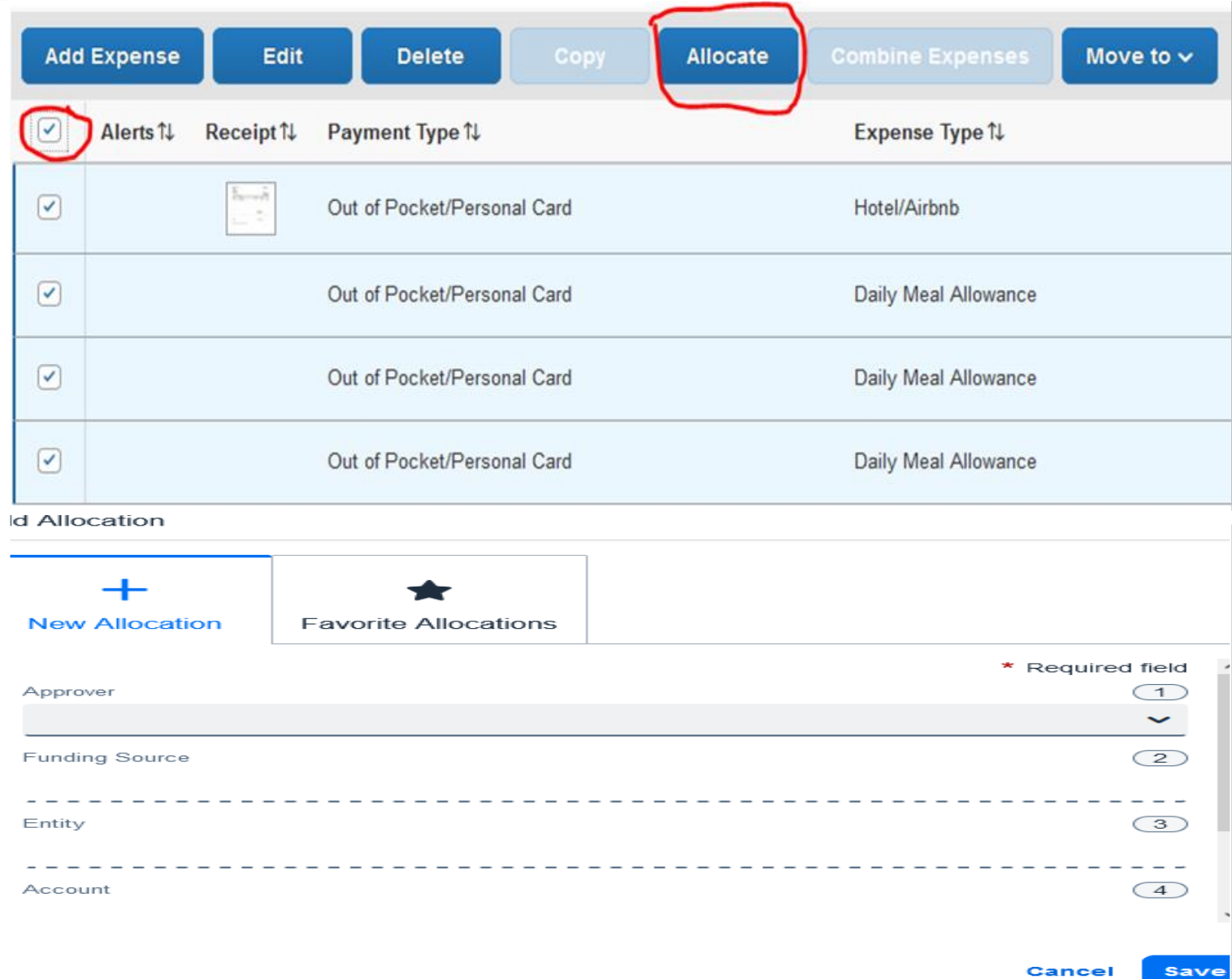
# Travel and Expense System Workflow




# Allocate - Traveler

A traveler can allocate and add an account to their expense report.

- Check off the expenses
- Allocate
- Fill in:
  - Approver (type last name)
  - Funding Source (drop down)
  - Entity (drop down)
  - Account (drop down)



Add Expense Edit Delete Copy **Allocate** Combine Expenses Move to ▾

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓
<input checked="" type="checkbox"/>			Out of Pocket/Personal Card	Hotel/Airbnb
<input checked="" type="checkbox"/>			Out of Pocket/Personal Card	Daily Meal Allowance
<input checked="" type="checkbox"/>			Out of Pocket/Personal Card	Daily Meal Allowance
<input checked="" type="checkbox"/>			Out of Pocket/Personal Card	Daily Meal Allowance

Id Allocation

+  
 New Allocation

★  
 Favorite Allocations

\* Required field

Approver (1)

Funding Source (2)

Entity (3)

Account (4)

Cancel
Save

# Allocate – Cost Approver

A Cost Approver can allocate and add an account to their expense report.

- Details, Allocate
- Check off expenses
- Select “Allocate Selected Expenses”
- Fill in:
  - Approver (type last name)
  - Funding Source (drop down)
  - Entity (drop down)
  - Account (drop down)
  - Funding Fiscal year

Allocations for Report: Concur Conference

Expense List

Allocate Selected Expenses | Clear Selections | Summary

Select Group ▾

<input checked="" type="checkbox"/>	Date ▾	Expense T...	Group	Amount
<input checked="" type="checkbox"/>	12/13/2017	Daily Meal ...	1	\$59.00
<input checked="" type="checkbox"/>	12/13/2017	Airfare	1	\$250.00
Hotel/Airbnb				
<input checked="" type="checkbox"/>	12/13/2017	Hotel/Airbnb	2	\$250.00
<input checked="" type="checkbox"/>	12/13/2017	Car Rental	1	\$100.00
<input checked="" type="checkbox"/>	12/14/2017	Daily Meal ...	1	\$15.00

Allocations Total: \$674.00 Allocated: \$674.00 (1)

Allocate By: ▾ | Add New Allocation | Delete Selected Allocations | Favorites ▾ | Add to Favorites

<input checked="" type="checkbox"/>	Percentage	Approver	Funding Source	Entity	Account	Funding Fis
<input checked="" type="checkbox"/>	100	▾				

Type to search by:

Text  Code

(Code) Text

(36961050-State-2106-8608070000) ACADEMIC ANALYTIC S

(19868230-State-1049-8607470000) BUSINESS REPORTING

(19868230-State-1049-8709530500) DIFR OH-TECH SERVIC

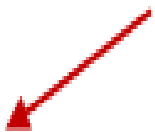
(23456701-RF-1049-1146700\_1\_75023) Business Reporting

(19868230-State-1049-9008230000) BUSINESS REPORTING

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(36961050) ABBEY, CRAIG W

(50245091) ABBOTT, JANEL



## Non-Employees – Paper Vouchers for their reimbursement

- Non-employees (guests, candidates, “unpaid” students) do NOT need to complete a travel pre-approval form.
- The reimbursement funding source will determine what type of voucher to use for reimbursement: RF, State, UBF

# Travel and Expense System Training

- Sign up for a Travel Training Session – UB Edge
  - Go to <https://www.buffalo.edu/administrative-services/training/training-catalog/procurement/travel-expense-system.html>
- Review Tip Sheets and Videos
  - Go to [buffalo.edu/travel-expense-system](https://buffalo.edu/travel-expense-system)

# Travel and Expense System Support

- Review Tip Sheets and Videos
  - Go to [buffalo.edu/travel-expense-system](https://buffalo.edu/travel-expense-system)
- Contact Business Services Customer Support
  - Email: [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu)
  - Call: 716-645-4500, press 2 for travel and expense system
  - Live Chat: go to [buffalo.edu/travel-expense-system](https://buffalo.edu/travel-expense-system) and click the Live Chat button

Questions ?

How did I do?--Take the Session Survey on your smart device using the QR Code on your schedule.

Thank You!