



UNIVERSITY  
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*Many Traditions One Alaska*

# TRAVELER QUICK GUIDE

Appendix C

An abridged guide to the three main Concur modules for travelers:  
Request, Travel, and Expense

Updated: 1 October 2020

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# Introduction

The University of Alaska (UA) uses a set of integrated tools to assist travelers with achieving their travel objectives and fulfilling their responsibilities. These tools include the Concur travel and expense software platform. This appendix provides an abridged guide to the three main Concur modules for travelers: Request, Travel, and Expense. Travelers should work with their department travel coordinators or delegates for additional assistance using Concur.

## Responsibilities

According to UA travel regulation R05.02.060(3)(a), the traveler is responsible for complying with department and UA policies and regulations, and for exercising good stewardship of UA funds.

This includes

1. Familiarizing themselves with the policies and procedures in the UA travel regulations as well as the policies and procedures of their campus, department, and program
2. Obtaining prior authorization for travel
3. Ensuring expenditures are necessary and appropriate for meeting business needs, including selecting the lowest-price fare/cost within the bounds of the most efficient mode
4. Verifying that all travel arrangements are confirmed prior to departure
5. Paying costs and any additional expenses incurred for personal preference or convenience
6. Notifying appropriate contact when there are changes/cancellations or if requesting refunds
7. Obtaining all proper documentation (e.g. itemized receipts) for each expense except “Per Diem Offset” and “Personal/Non Reimbursable”
8. Ensuring [expense] Report is prepared and submitted with appropriate receipts within 90-days of trip completion

## Glossary

The following are a few commonly used travel terms defined by their purpose in this guide.

**Allocate** – Assign the expense to UA funding different from the primary funding in the Header or distribute the expenses to more than one UA funding source

**Audit Flag** – A notification that something in the document requires attention and possible correction.

**Yellow Audit Flag** (Alert/Warning) – A soft stop alert or warning that may indicate a possible compliance issue, but still allows submission of the Request or Report. For example, notification of Fly America regulations on international travel.

**Red Audit Flag** (Exception) – A hard stop exception indicating an issue that requires resolution before submitting the Request or Report. For example, entering personal time without attaching a business-only cost comparison.


**Corporate Travel Management (CTM)** – The travel agency hired by UA to manage the booking portion of Concur and provide full travel booking services.

**Lowest Logical Cost (or Least Cost Logical)** – A business expense that meets the criteria of necessary, prudent, and as economical as possible. Economical meaning the lowest-price fare/cost within the bounds of the most efficient mode. An efficient mode is normally the most direct route that takes into consideration the business need, the traveler's time away from their workstation, and safety.

**Receipt** – A document on which the things that you buy or the services for which you pay are listed with the total amount paid and the prices for each. An itemized receipt includes a name for/description of the good or service.

**Reconcile** – Procedure to match transactions in Concur (or other UA finance system) with the associated accounting in Banner.

**Reimbursable Expense** – Allowable UA business expense either prepaid by UA via the agency or travel cards or paid out-of-pocket by the traveler.

**Tool Tip**  – A helpful hint or suggestion for a field or entry. Hovering the mouse over the blue arrow/question mark pulls up the information.

**Travel Status** – Period of time from when the traveler leaves their workstation/residence to when they return to their workstation (during work hours) or residence (outside of work hours).

## Login

If you have a [UAUsername@alaska.edu](mailto:UAUsername@alaska.edu) email address

1. Start by navigating to the Concur login link on the [UA Travel](#) website



2. Login via single sign-on (SSO) using your UA credentials

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**Login to Concur Travel  
Expense**

UA Username

UA Password

Don't Remember Login - No SSO

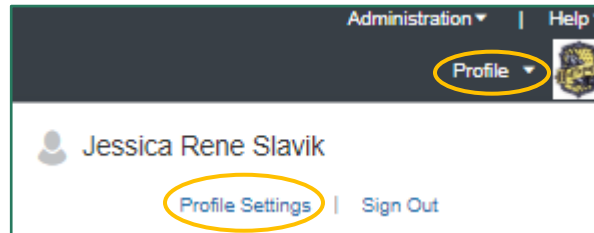
Login

Your SSO information including passwords is managed by OIT through [ELMO](#).

# Profile

The first step for all Concur travelers is viewing and updating your profile options. In the upper right-hand corner of the Concur dashboard, select the drop-down menu on Profile.

To view and modify profile information, select Profile Settings.



<p><b>Your Information</b></p> <ul style="list-style-type: none"><li>Personal Information</li><li>Company Information</li><li>Contact Information</li><li>Email Addresses</li><li>Emergency Contact</li><li>Credit Cards</li></ul> <p><b>Travel Settings</b></p> <ul style="list-style-type: none"><li>Travel Preferences</li><li>International Travel</li><li>Frequent-Traveler Programs</li></ul> <p><b>Request Settings</b></p> <ul style="list-style-type: none"><li>Request Information</li><li>Request Delegates</li><li>Request Preferences</li><li>Request Approvers</li><li>Favorite Attendees</li></ul> <p><b>Expense Settings</b></p> <ul style="list-style-type: none"><li>Expense Information</li><li>Expense Delegates</li><li>Expense Preferences</li><li>Expense Approvers</li><li>Favorite Attendees</li></ul> <p><b>Other Settings</b></p> <ul style="list-style-type: none"><li>E-Receipt Activation</li><li>System Settings</li><li>Connected Apps</li><li>Concur Connect</li><li>Change Password</li><li>Travel Vacation Reassignment</li><li>Concur Mobile Registration</li><li>I'm Assisting...</li></ul>	<h2>Profile Options</h2> <p>Select one of the following to customize your user profile.</p> <p><b>Personal Information</b> Your home address and emergency contact information.</p> <p><b>Company Information</b> Your company name and business address or your remote location address.</p> <p><b>Credit Card Information</b> You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.</p> <p><b>Travel Profile Options</b> Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p><b>Expense Delegates</b> Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p><b>Expense Preferences</b> Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.</p> <p><b>Concur Mobile Registration</b> Set up access to Concur on your mobile device.</p>	<p><b>System Settings</b> Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?</p> <p><b>Contact Information</b> How can we contact you about your travel arrangements?</p> <p><b>E-Receipt Activation</b> Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p><b>Travel Vacation Reassignment</b> Going to be out of the office? Configure your backup travel manager.</p> <p><b>Request Preferences</b> Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.</p> <p><b>Change Password</b> Change your password.</p>
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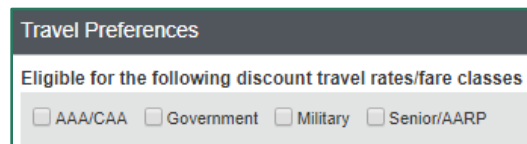
## Personal Information

You must fill in required fields in your Personal Information such as middle name and contact information. You should also verify and update emergency contacts and travel preferences including mileage and membership plans. You can verify your email address and activate e-receipts from the Personal Information screen as well (covered later in this section).

DO NOT include special characters such as periods and hyphens. Special characters in the name, mileage plan, etc. cause the account to error during booking.

The mailing address is used by CTM and Concur Reporting but does not reflect where travel reimbursement checks are sent. Instead, checks are mailed to the most recent AP, HR, or MA address in Banner (whichever is newest). Please work with your department to ensure this information is up to date.

You can select eligible discount classes under Travel Preferences. If the “Government” discount is selected, the booking tool provides federal and state government rates available through the vendor. Unless you are eligible for federal or other state government rates/discounts, we recommend unselecting this preference before booking out of state travel.

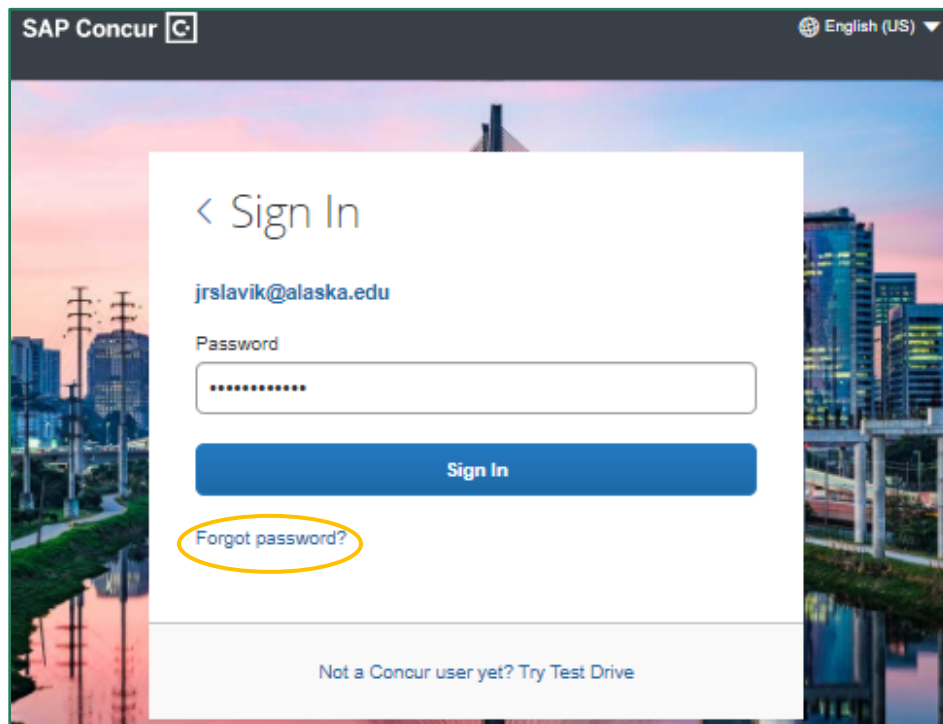


Travel Preferences

Eligible for the following discount travel rates/fare classes

AAA/CAA  Government  Military  Senior/AARP

**Hot Tip:** We recommend alaska.edu users also set a password in their Concur profile. This allows you to access Concur via [Concur Solutions](#) in the event the UA server is down. If you do not, Concur Solutions is still an accessible login. Click “Forgot password?” to set/reset the account password. This password is not linked with your SSO password.



SAP Concur

English (US)

< Sign In

jrslavik@alaska.edu

Password

.....

Sign In

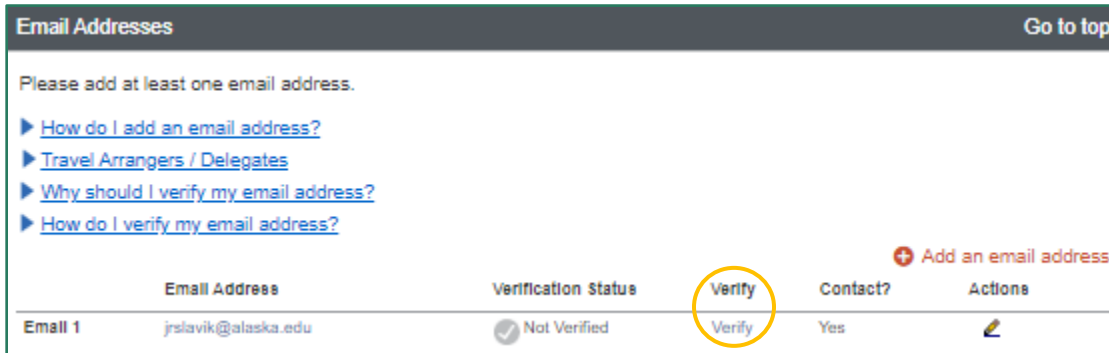
Forgot password?

Not a Concur user yet? Try Test Drive

## Verify Email

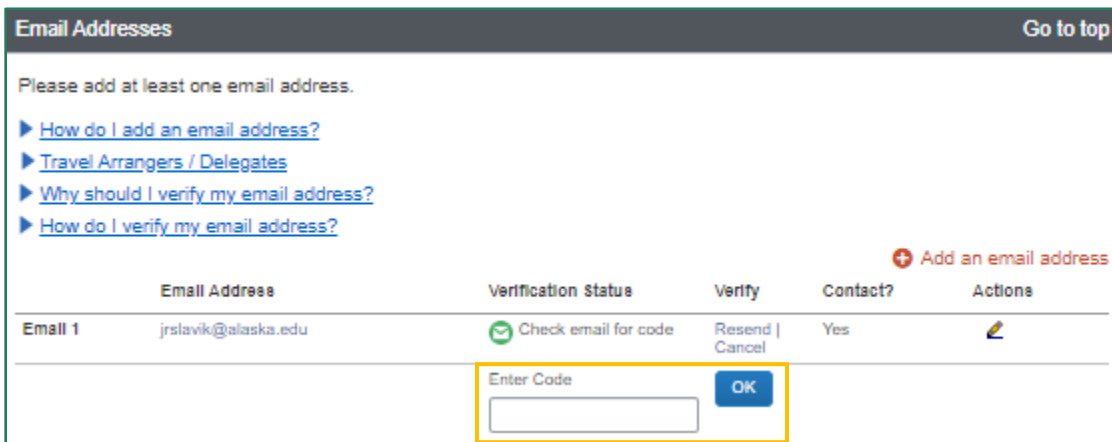
Verifying an email address enables you to forward receipts from the verified email account directly to your Available Receipts section of Concur Expense. Once verified, you can email receipts to [receipts@concur.com](mailto:receipts@concur.com) and forward itineraries or travel plans to [plans@concur.com](mailto:plans@concur.com). We recommend verifying all email addresses used to receive receipts for UA business travel.

1. Scroll down the page to the Email Addresses section in Personal Information or click the Email Addresses link on the left side of the page
2. Click the Verify link next to the email address



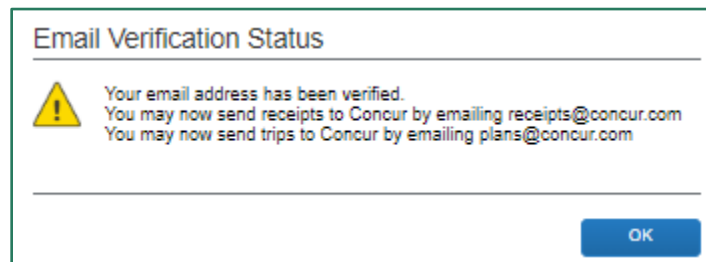
The screenshot shows the 'Email Addresses' section of a user profile. At the top, there is a header 'Email Addresses' and a 'Go to top' link. Below the header, there is a message: 'Please add at least one email address.' followed by four links: 'How do I add an email address?', 'Travel Arrangers / Delegates', 'Why should I verify my email address?', and 'How do I verify my email address?'. On the right side, there is a red '+' icon and the text 'Add an email address'. Below this is a table with the following columns: 'Email Address', 'Verification Status', 'Verify', 'Contact?', and 'Actions'. The table contains one row for 'Email 1' with the email address 'jrslavik@alaska.edu', a 'Not Verified' status with a checkmark icon, a 'Verify' link circled in yellow, 'Yes' for 'Contact?', and an edit icon for 'Actions'.

3. The system sends a verification code to the email address
4. Enter the verification code in the Enter Code field and click "OK"



The screenshot shows the 'Email Addresses' section after the verification process has started. The 'Verify' link has been replaced by 'Resend | Cancel'. Below the table, there is a yellow-bordered box containing an 'Enter Code' label, a text input field, and an 'OK' button. The rest of the page content is the same as in the previous screenshot.

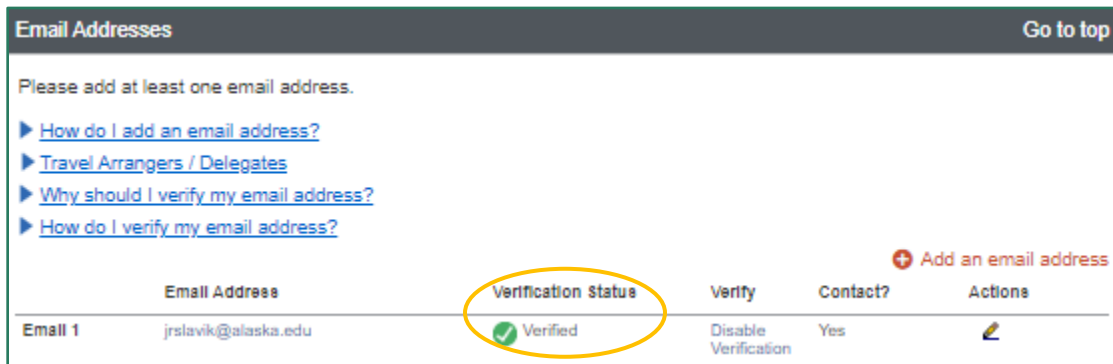
5. A confirmation message appears with information on where to send receipts and trip itineraries (from non-Concur/CTM bookings)



The screenshot shows a confirmation message titled 'Email Verification Status'. It features a yellow warning triangle icon. The text reads: 'Your email address has been verified. You may now send receipts to Concur by emailing receipts@concur.com. You may now send trips to Concur by emailing plans@concur.com'. At the bottom right, there is an 'OK' button.



- The email now has a green check indicating it as “Verified;” click Save

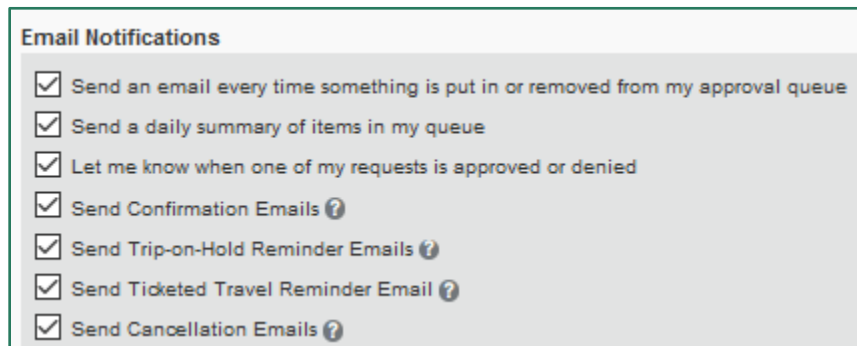


## Email Notifications

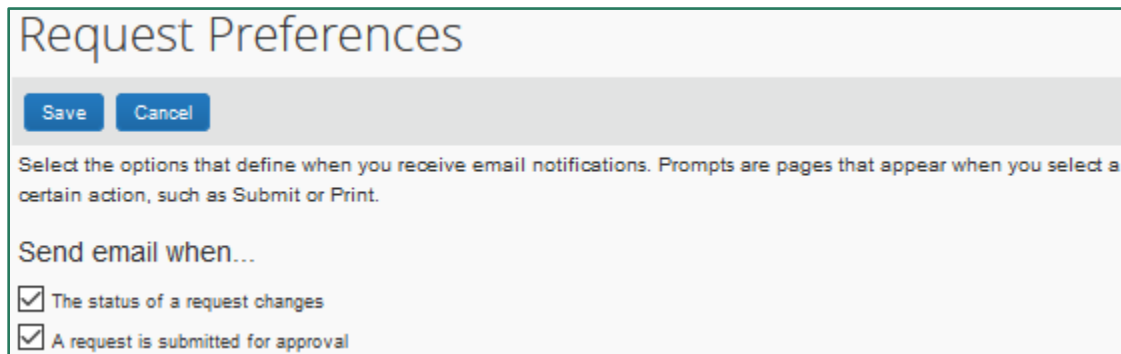
Concur offers multiple email notification options for Request, Travel, and Expense. You can manage some of the Concur email notification settings in three areas.

**Note:** Emails sent to travelers from Concur come from an @concursolutions email address such as [autonotification@concursolutions.com](mailto:autonotification@concursolutions.com). Emails sent from CTM come from [ua@travelctm.com](mailto:ua@travelctm.com). UA recommends marking these email addresses as safe senders. Otherwise, the notification emails may filter to a spam folder.

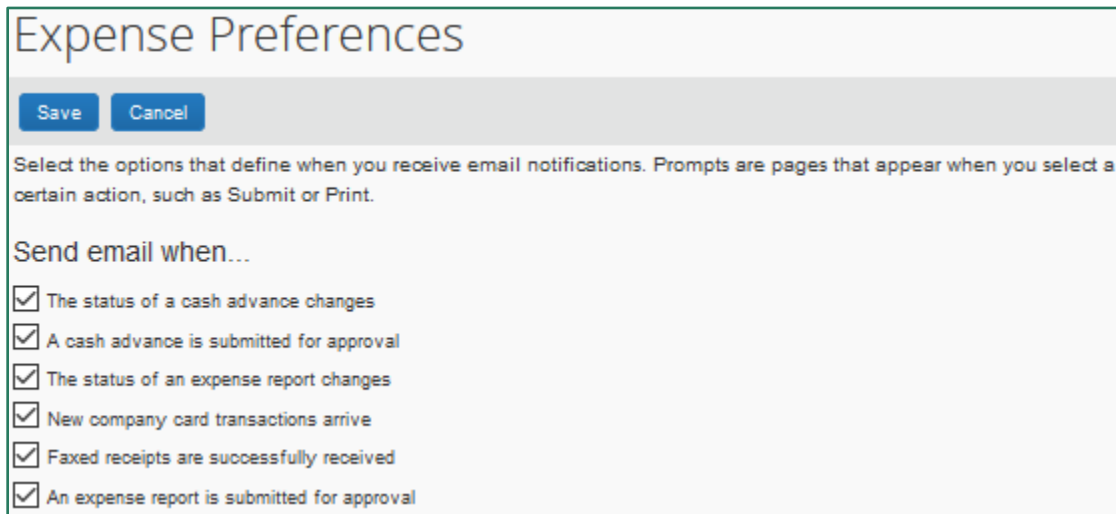
- System Settings



- Request Preferences



### 3. Expenses Preferences



The image shows a screenshot of the 'Expense Preferences' dialog box. At the top, the title 'Expense Preferences' is displayed. Below the title are two buttons: 'Save' and 'Cancel'. A descriptive text reads: 'Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.' Underneath, the section 'Send email when...' is followed by a list of six items, each with a checked checkbox:

- The status of a cash advance changes
- A cash advance is submitted for approval
- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval

## Activate E-Receipts

The “E-Receipt Activation” link is found under Other Settings in the left-hand column. You can enable or disabled e-receipts at any time.

E-receipts are available for vendors with a Concur relationship. When you enable e-receipts and either connect to a supplier through the App Center or the My Travel Network in Concur, these e-receipts show up in Expense under the Available Expenses/Receipts section.

Airfare booked through Concur or CTM also has an e-receipt connected to the itinerary date. This negates the need to upload an additional receipt for airfare. At the very least, we recommend you activate e-receipts because of the airfare receipt.

## Manage Delegates

A delegate is a person authorized to act on your behalf. Request and Expense share delegates, so assigning a delegate to one assigns it to the other.

1. Select Request Delegates or Expense Delegates from Profile Settings
2. The “Delegates” tab is persons assigned as delegates to your account
3. Click “Add” then search for and select the desired delegate’s name
4. Assign the applicable permissions and click “Save”

### Request Delegates

Delegates
Delegate For

Add
Save
Delete

Delegates are employees who are allowed to perform work on behalf of other employees.  
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 Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Test, Admin admin@alaska.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input style="width: 50px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test, COA1 Approver coa1@alaska.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input style="width: 50px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test, COA2 Approver coa2@alaska.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input style="width: 50px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test, Default Approver approver@alaska.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input style="width: 50px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The following permissions are for travel coordination:

1. Can Prepare – The delegate may prepare Requests and Reports on your behalf. You are still required to submit the Report.
2. Can Book Travel – The delegate may arrange Travel on your behalf. Delegates receive the same booking email notifications regardless of who completes the booking.
3. Can Submit Reports – Delegates cannot submit a Report on your behalf. However, the “Can Submit Reports” permission allows the delegate to click “Submit Report” to view and resolve any audit flags before you submit.
4. Can Submit Requests – Delegates cannot submit and approve the same Request.
5. Can View Receipts [and available expenses] – Should check by default when Can Prepare is selected.
6. Receives Emails – The delegate receives system emails sent to you.

The last four permissions are for approval delegation:

1. Can Approve [indefinitely on the approver’s behalf] – Use this option to set a backup that can always approve on your behalf (no time limit). Before giving an individual this type of delegate access please ensure they have the authority to approve on your behalf.
2. Can Approve Temporary (a date range is required) – Use this option to set a date range for someone to approve on your behalf.
3. Can Preview for Approver – Use this option to set a delegate to preview the Report/Request before you. This delegate cannot approve the Report/Request. Instead, the delegate’s task is to ensure that the Report/Request is ready for you to review and approve. With this option, you can wait until the preview delegate has selected Notify Approver (which generates an email notification to the approver), or you can approve the Report/Request without this delegate’s review.
4. Receives Approval Emails – Delegate is copied on approval notification emails.

# Submit a Request

The Request module is used to plan, organize, and request approvals for UA business travel. A Request provides a general estimate or plan for your trip including anticipated costs to UA. A Request is required for all business travel including trips partially or wholly paid by a third party (even when self-funded).

Before starting a Request, gather and work out basic itinerary details:

1. To where and when is business travel needed?
2. Will the trip include personal travel days? If so, what dates?
3. How are you getting there? Where are you staying? How will you get around once there?
4. Are you taking the per diem allowance? Are you taking meal support at actual cost (“Actual Meal”) and need to keep receipts?
5. Are there any other travel expenses to think about such as registration fees, a visa for international travel, etc.?
6. Use the booking tool to develop estimates for trip costs (“Look but Don’t Book”) and obtain a business-only cost comparison if the trip includes personal time.
7. Confirm funding source(s) for UA paid expenses.

## “Look but Don’t Book”

Use the Trip Search to build cost estimates for the trip by viewing available flights, hotel rooms, and car rentals. This function is also used to capture the business-only cost comparison to attach to the Request when taking personal time in conjunction with UA business travel.

1. Search for available round trip, one way, and multi-city flights
  - a. If flight includes a layover longer than 4 hours, use multi-city search option
  - b. Select “Pick-up/Drop-off car at airport” to add rental car to search
  - c. Select “Find a Hotel” to add hotel to search
2. Enter dates, destinations, and times in booking tool
3. Search for only car rental, hotel, or train by selecting the associated icon

The screenshot shows the 'TRIP SEARCH' interface. At the top, there are options for 'Booking for myself' (selected) and 'Book for a guest'. Below this are icons for flight, car, hotel, and train. The main section is 'Mixed Flight/Train Search' with tabs for 'Round Trip', 'One Way', and 'Multi City'. The 'From' field is set to 'FAJ - Fairbanks Intl Airport - Fairbanks, AK' and the 'To' field is 'ANC - Anchorage Ted Stevens Intl Airport - Anchorage, A'. The 'Depart' date is '07/29/2021' and the 'Return' date is '08/01/2021'. There are dropdown menus for 'depart' and 'Anytime' for both dates. Below the dates are checkboxes for 'Pick-up/Drop-off car at airport' and 'Find a Hotel'. At the bottom, there are dropdown menus for 'Class' (set to 'Economy class') and 'Search by' (set to 'Price'), and a checkbox for 'Specify a carrier'. A red 'Search' button is at the bottom.

FAIRBANKS, AK TO ANCHORAGE, AK  
MON, AUG 31 - SAT, SEP 5

Hide matrix Print / Email

1	All	Alaska Airlines	Delta	Multiple
	206 results	Preferred	Preferred	
	Nonstop	194.70	—	—
	24 results	24 results		
	1 stop	309.20	767.90	567.20
	120 results	104 results	2 results	14 results
	2 stops	396.70	—	—
	50 results	50 results		
	3 stops	484.70	—	—
	12 results	12 results		

3 4

Shop by Fares Shop by Schedule

Caution: Upon occasion Frontier and Alaska Airlines offer unique fares indicated as "WebDirect" in the fare details. They are instant purchase, non-refundable and unable to be voided. Also Southwest Airlines and Frontier are instant purchase and unable to be voided.

Flight Number Search 5 Sorted By: Price - Low to High

Displaying: 206 out of 206 results. Previous | Page: 1 of 21 | Next | All

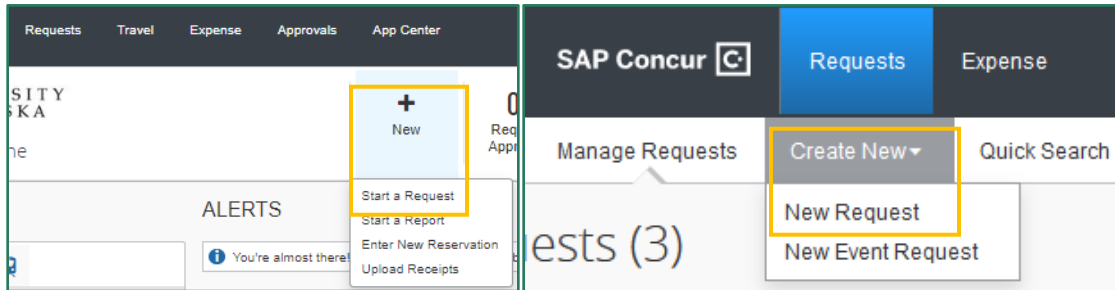
Alaska Airlines	11:50 AM FAI → 12:43 PM ANC	Nonstop	53m	Main \$194.70	Refundable Main \$447.10
				Select	Select
Alaska Airlines	06:00 AM ANC → 06:55 AM FAI	Nonstop	55m		
Preferred Airline		6	More fares/details		
Alaska Airlines	11:50 AM FAI → 12:43 PM ANC	Nonstop	53m	Main \$194.70	Refundable Main \$447.10
				Select	Select
Alaska Airlines	11:15 PM ANC → 12:11 AM FAI	Nonstop	56m		
Preferred Airline			More fares/details		


7

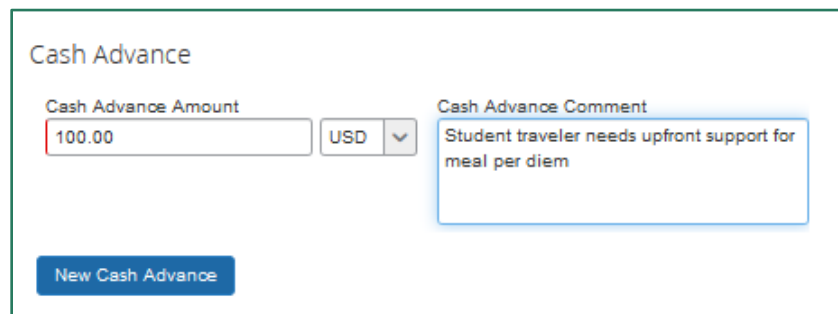
1. Top Matrix – Filter by airline or number of stops
2. Left Filter Fields – Filter search by flight times, prices, and airports
  - a. Open “Change Search” to adjust dates, times, and locations
  - b. Change departure times to “Anytime” to search for all available flights (highly recommended for all airfare searches)
3. Shop by Fares – Lists flight results by price (outbound and inbound combined if round trip)
4. Shop by Schedule – Choose outbound and inbound flights independently
5. Flight Number Search – Find a specific flight (especially helpful when trying to find the same flight listed on an airline’s website)
6. “More fares/details” – View full itinerary details
7. “Select” the flight to access a print-friendly version of the chosen itinerary

## Create New

1. Create a new Request by selecting “Start a Request” from New on the homepage or “New Request” from the Create New menu in the Request module



2. Enter the required Request Header information including dates and location of travel, business purpose, and funding source
  - a. Hover over the tool tip icon  for additional information and guidance on how to answer the field
    - i. **Trip Name** – Use naming convention “Last name, first initial, dates of travel (mm/dd-mm/dd) and airport or city location (e.g. SEA or Seattle);” condense or abbreviate where appropriate
    - ii. **Trip Description** – A clear, concise descriptive summary of the work that will be completed and why it needs to be completed; please avoid acronyms and initialisms
    - iii. **Traveler Type** – Student employees should change this to “Staff” if travel involves your work assignment (e.g. research assistants conducting fieldwork)
    - iv. **Funding Source** – Search by code or name to select the primary funding for the trip (allocations are created in the Expenses tab)
  - b. Provide any additional required or pertinent information in the Comments field
  - c. Attach required or supplemental documentation such as a business-only cost comparison or meeting agenda
3. Formally request a travel advance in the Cash Advance portion of the Request Header
  - a. Comments help the Cash Advance Admin determine allowability of the requested advance
  - b. Contact your department travel coordinator or campus travel office if you need a travel advance and the Cash Advance portion is not available on the Request

The image shows a screenshot of the 'Cash Advance' form. It has a title 'Cash Advance' at the top. Below the title, there are two main sections. The first section is 'Cash Advance Amount', which includes a text input field containing '100.00', a dropdown menu set to 'USD', and a small downward arrow icon. The second section is 'Cash Advance Comment', which is a text area containing the text 'Student traveler needs upfront support for meal per diem'. At the bottom of the form, there is a blue button labeled 'New Cash Advance'.

4. Select the Segments tab to enter airfare, lodging, and/or car rental expense information

- a. Click the icon to create the associated expense
- b. Enter information in the required fields and Save
  - i. Type of airfare routing during booking is restricted to the information entered in Segments (i.e. round trip, one way, or multi-segment)
    1. If flight will include a layover longer than 4 hours, must choose multi-segment
    2. If trip includes a personal deviation, enter routing type based on the business-only
  - ii. Dates, times, and location for each segment are adjustable during booking with some restrictions
    1. Cannot change airfare to a multi-city search
    2. For a car rental at the airport location, make sure the city location includes an airport code (e.g. "Dallas, TX" returns rental locations in the city of Dallas while "Dallas, TX- DFW Dallas Fort Worth International" returns rental locations at the airport)
  - iii. Amount entered is the total estimated cost



5. Select the Expenses tab to add additional estimated expenses other than airfare, lodging, and car rental

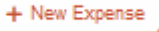
The screenshot shows the 'Expenses' tab in a software application. On the left, there is a table with the following data:

Date	Expense Type	Amount	Requested
10/20/2020	Airfare	\$900.00	\$900.00
10/20/2020	Lodging	\$200.00	\$200.00
10/20/2020	Car Rental	\$200.00	\$200.00

On the right side, there is a section for 'Expense Type' with a dropdown menu. Below it, a list of expense types is displayed, with '02. Meal Expenses' highlighted by a yellow box. The list includes:

- 02. Meal Expenses
  - Actual Meal
  - Daily Per Diem
  - Daily Per Diem (Multi-Location)
  - Group Per Diem
  - Per Diem Reduction
- 03. Other Expenses
- 04. Mileage

Instructions on the right state: '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.'

- a. Select the Expense Type from the list on the right (use  to view this menu if not already visible)
- b. "Daily Per Diem" calculates based on the final destination and business travel dates in the Request Header

This screenshot shows the expense form with the following fields:

- Expense Type: Daily Per Diem
- Business Travel Start Date: 10/20/2020
- Business Travel End Date: 10/25/2020
- Destination City: Seattle, Washington
- Transaction Amount: 0.00
- Transaction Currency: USD
- Comment: (empty)

- c. Use "Other Expenses" to capture expenses without an assigned Expense Type (e.g. supplies or parking); more specific designations are available on the [expense] Report

This screenshot shows the expense form with the following fields:

- Expense Type: 03. Other Expenses
- Transaction Amount: 0.00
- Transaction Currency: USD
- Comment: Parking

6. If needed, allocate expenses to additional funding sources
  - a. Select any expense from Expenses and click “Allocate”

The screenshot shows the 'Request Header' interface with tabs for Segments, Expenses, Approval Flow, and Audit Trail. The 'Expenses' tab is active, displaying a table with columns: Date, Expense Type, Amount, and Requested. The table contains two rows: 10/20/2020 Airfare (\$900.00) and 10/20/2020 03. Other Expenses (\$50.00). The '03. Other Expenses' row is selected. To the right, the 'Expense Type' dropdown is set to '03. Other Expenses', and the 'Transaction Amount' is \$50.00 USD. At the bottom right, there are 'Save', 'Allocate', and 'Cancel' buttons. The 'Allocate' button is highlighted with a yellow box.

Date	Expense Type	Amount	Requested
10/20/2020	Airfare	\$900.00	\$900.00
10/20/2020	03. Other Expenses	\$50.00	\$50.00

TOTAL AMOUNT: \$1,806.00 | TOTAL REQUESTED: \$1,806.00

- b. Select expenses to allocate and click “Allocate Selected Expenses”
      - i. Segments are always allocated together on the Request
      - ii. The option to separately allocate Segments is available on the Report

The screenshot shows the 'Request List' interface with buttons for 'Allocate Selected Expenses', 'Clear Selections', and 'Summary'. Below the buttons is a table with columns: Date, Expense Type, Group, and Amount. The table contains three rows: 10/20/2020 Airfare (\$900.00), 10/20/2020 03. Other Ex... (\$50.00), and 10/20/2020 Daily Per Diem (\$456.00). The '03. Other Ex...' and 'Daily Per Diem' rows are selected. The 'Allocate Selected Expenses' button is highlighted with a yellow box.

Date	Expense Type	Group	Amount
10/20/2020	Airfare		\$900.00
10/20/2020	03. Other Ex...		\$50.00
10/20/2020	Daily Per Diem		\$456.00

- c. If assigning the full cost of selected expense(s) to one funding source different from the primary funding on the Request Header, enter the funding here and Save
      - d. If assigning the cost of selected expense(s) to multiple funding sources, use Add New Allocation to enter additional funding and Save

The screenshot shows the 'Allocations' interface with a summary: Total:\$506.00 Allocated:\$506.00(100%) Remaining:\$0.00(0%). There are buttons for 'Allocate By:', 'Add New Allocation', 'Delete Selected Allocations', and 'Favorites'. Below is a table with columns: Percentage, Fund, Org, Department, Campus, and Activity Code. The table contains two rows: 50% for Fund (101010) SW ... and 50% for Fund (142510) UAF... The 'Add New Allocation' button is highlighted with a yellow box.

Percentage	* Fund	* Org	* Department	* Campus	Activity Code
50	(101010) SW ...	(80042) Fina...	(D8FNSY) SW...	(SW) Universit...	
50	(142510) UAF...	(50172) FC E...	(D5RISK) Cen...	(UAF) Univers...	

- e. Allocate By provides options to allocate based on percentage or amount

This screenshot is identical to the previous one, but the 'Allocate By:' dropdown menu is open, showing two options: 'Percentage' (selected) and 'Amount'. The dropdown menu is highlighted with a yellow box.

- f. Allocated expenses are indicated by the multi-colored pie chart icon

Request Header <span style="color:red">!</span> Segments Expenses Approval Flow Audit Trail				
<input type="button" value="+ New Expense"/> <input type="button" value="Delete"/> <span style="float:right">«</span>				
<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	10/20/2020	Airfare	\$900.00	\$900.00
<input type="checkbox"/>	10/20/2020	03. Other Expenses	\$50.00	\$50.00
<input type="checkbox"/>	10/20/2020	Daily Per Diem	\$456.00	\$456.00
<input type="checkbox"/>	10/20/2020	Lodging	\$200.00	\$200.00

- 7. Select Submit Request followed by Accept & Submit on the Final Review pop-up window

**Status: Not Submitted**  
**Amount: \$1,806.00**

- 8. Once submitted, the Cancel Request and Recall options are available and the Status changes to “Submitted & Pending Approval [by <approval step>]”
  - a. If the Request is not yet approved, you can Recall it to make changes
  - b. Do not Recall a Request no longer in “Pending on-line Booking” status as doing so may cancel existing bookings for the trip

**Status: Submitted & Pending Approval by your Supervisor**  
**Amount: \$1,806.00**

- 9. Depending on your email notification settings, you receive an email notification of Request submission, return, and/or approval(s)
- 10. Once approved by all approver’s in the Approval Flow, Action has either a “Book” or “Expense” link available

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted ▼	Total	Approved a...	Remaining...	Action
<input type="checkbox"/>	Slavik, J 10/20-10/25 SEA Concur Fusion 2020	4339	Pending on-line Booking	10/20/2020 10/25/2020	07/09/2020	\$1,806.00	\$0.00	\$0.00	Book

## Personal Travel

Travelers may coordinate personal travel arrangements in conjunction with their UA business travel. This includes personal extended stays at the business location and personal deviations to a non-business location. You have the option of booking some or all portions in the booking tool depending on the type of personal travel.

You must identify on the Request personal days taken in conjunction with UA business travel. For this reason, the Request Header includes a section for documenting your personal days.

Will this trip include personal travel? <sup>1</sup> ?	Personal Travel Dates <sup>1</sup> ?
Yes	10/28-11/2

### Extended Stay

When a traveler extends their stay at the UA business destination(s) for personal reasons, it is a personal deviation with an extended stay.

Your business-only dates of travel are entered in the Request Segments. You can change the dates of travel to accommodate the extended stay during booking.

### Personal Deviation

When a traveler goes to an additional destination outside of the UA business routing or destination(s), it is considered a personal deviation with a routing change.

If you are using the booking tool for your business-only portion, that portion is entered in Segments. Otherwise, “Outside Concur/CTM” is selected as your booking method, and the full business-only itinerary is entered in Segments. Airfare costs in Expenses reflect the total cost of the business-only itinerary.

### Business-Only Cost Comparison

The business-only cost comparison provides the lowest logical cost for the business purpose and is used to determine the allowable reimbursable expenses on your [expense] Report including per diem. The cost comparison must come from the Concur booking tool as it applies UA’s discounted rates.

The itinerary must reflect the business trip as though no personal travel is included. For example, your business travel dates are Aug 31 – Sep 5 in Dallas and personal days are Aug 20 – 30 in Seattle. The business-only itinerary is traveling from your home/duty station to Dallas on Aug 31 and returning on Sep 5. The time in Seattle is excluded entirely.

Use the “Look but Don’t Book” portion as a guide for securing a cost comparison.

1. Use the Trip Search to search for flights based on the business-only itinerary
2. Find and select the most appropriate business-only flight
  - a. The chosen flight must represent the lowest logical cost for the most efficient route
  - b. The cost comparison must include the full flight and cost details on the Review and Reserve Flight screen
3. Attach a pdf version of the flight information to the Request

## Past Fare Quote

If a cost comparison is not obtained from the booking tool prior to your trip, you must work with CTM to obtain a past fare quote. A delegate may obtain this documentation on your behalf, but the cost of this service is your responsibility (documented as Expense Type “Personal/Non Reimbursable” on the Report).

Send an email to [ua@travelctm.com](mailto:ua@travelctm.com) or call CTM at 907-786-0107 to request a past fare quote for the authorized Request. Include the following information in the email:

Subject: PAST DATE FARE REQUEST

Body: Profile name (UOFA)

Name of traveler

Dates, times, and destinations of authorized business travel (NOT the personal itinerary)

Date trip was authorized (this provides the agent with any advance purchase information)

Originally approved Request ID

CTM will either charge the agency card the full touch fee of \$18.00 or your personal credit card if provided over the phone.

## Book a Trip

Travelers have several options for booking travel. You can use the Travel booking tool to book from an approved Request, book from the Travel module and create a new Request, contact Corporate Travel Management (CTM) directly with an approved Request, or book with the vendor for lodging and car rentals.

Travelers also have a few options for booking rural air travel with a non-GDS carrier such as Wrights Air. You can book directly with the non-GDS carrier or contact CTM directly (must have an approved Request. If the trip includes air travel on rural and non-rural carriers, you can book the non-rural portion in Concur and instruct CTM to book the rural portion using the “Comments for the Travel Agent” box on the Trip Booking Information screen.

CTM is a travel agency contracted by UA to assist our organization with booking and purchasing travel components. If you ever encounter difficulties with the booking tool, contact CTM to book the trip. Our dedicated UA CTM team is in Anchorage and available Monday-Friday from 8 a.m. to 5 p.m. CTM also has agents available 24/7 to assist travelers during our team’s off-hours.

Our CTM team manages the following tasks on our behalf:

1. Maintain and update the Concur Travel booking tool
2. Administer corporate discounts – The rates visible in the booking tool are based on State of Alaska contract rates and industry standards
3. Ticket travelers via the booking tool, rural request tool, emails, and phone calls
4. Transmit traveler information to carriers including mileage memberships, TSA pre-check, and passport data
5. Charge the agency card for purchases made via the booking tool, rural request tool, emails, and phone calls
6. Cancel purchased tickets when requested, paying any change or cancellation fees using the agency card
7. Track and manage credits from cancelled or postponed trips

Airfare reservations are paid on the agency card held by CTM. Hotel reservations are held with the UA travel card information entered in your Concur profile. You can also indicate CTM use the agency card to book and pay for lodging.

**Note:** The option to use the agency card for car rentals is not available.

## From Request

If using the booking tool, book from the approved Request. Do not stop in the middle of the booking. If you do, the link between Request and Travel is broken which generates a new Request. If booking is interrupted, go back to the Request to re-start the booking process.

**Note:** If booking from Request is unknowingly interrupted before completion (e.g. clicking on another browser during booking, the booking process sits idle for too long, etc.), the link between Travel and Request may break. See [“Book a Trip: From Travel”](#) for instructions on what to do if this happens.

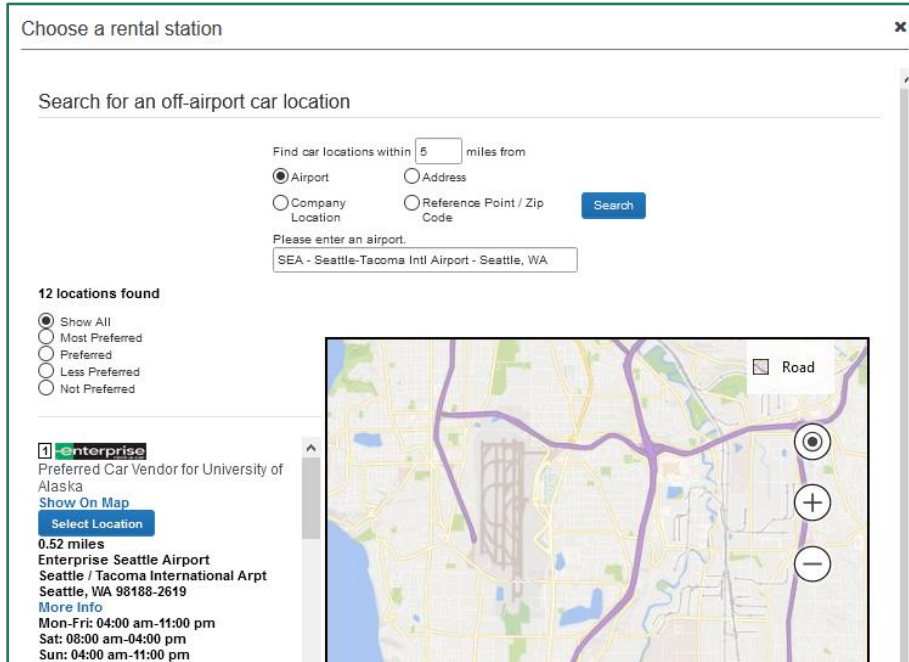
1. In the Request module, click “Book” in the Action column of the associated Request

The screenshot shows the SAP Concur interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. Below the navigation, there are options for 'Manage Requests', 'New Request', and 'Quick Search'. The main content area is titled 'Active Requests (62)' and contains a search bar with fields for 'Request Name' and 'Begins With', and a 'Go' button. Below the search bar is a table of requests. The table has columns for 'Request Name', 'Request ID', 'Status', 'Request Dates', 'Date Submitted', 'Total', 'Approved...', 'Remaining...', and 'Action'. One request is visible: 'Slavik, J 10/20-10/25 SEA Concur Fusion 2020' with Request ID 4339, Status 'Pending on-line Booking', Request Dates '10/20/2020 - 10/25/2020', Date Submitted '07/09/2020', Total '\$1,350.00', Approved '\$0.00', and Remaining '\$0.00'. The 'Action' column for this request has a 'Book' button highlighted with a yellow box.

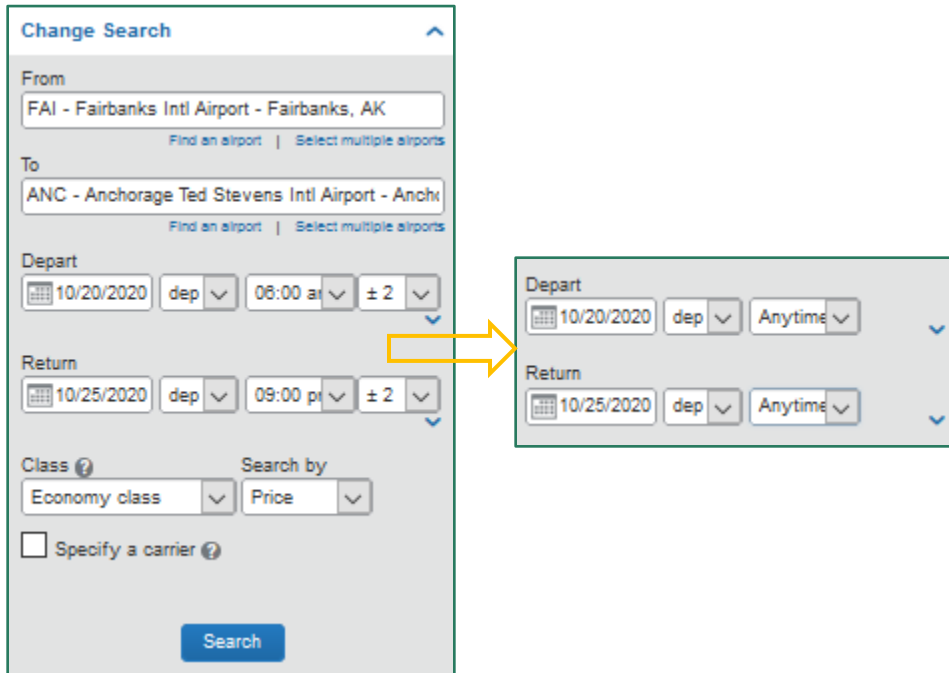
2. Your Itinerary
  - a. Information entered in Segments is plugged into the booking tool
  - b. Dates, times, and locations for each segment are changeable after this screen

The screenshot shows the 'Your Itinerary' page. On the left, there is a summary box for 'Slavik, J 10/20-10/25 SEA' with start and end dates, purpose, and a 'View Detail' button. The main content area is titled 'Your Itinerary' and contains a 'TRAVEL REQUEST ITINERARY' section. This section lists three segments: 'Air Ticket' (Fairbanks Intl Airport (FAI) to Seattle-Tacoma Intl Airport (SEA)), 'Air Ticket' (Seattle-Tacoma Intl Airport (SEA) to Fairbanks Intl Airport (FAI)), 'Car Rental' (Seattle, Washington to Seattle, Washington), and 'Hotel Reservation' (Seattle, Washington). Each segment includes details like departure/pick-up/check-in times and locations. At the bottom of the itinerary section, there is a checkbox labeled 'Only show me this page when I need to provide extra information' and a 'Proceed to booking' button highlighted with a yellow box.

- c. If car rental is included, you must assign rental station locations on this screen (choose any available at any location if intending to skip car rental booking)



- 3. Run Template – Indicate whether federal funds are used (for reporting purposes only)
- 4. Segment Search and Select
  - a. Select desired airfare, lodging, car rental, and/or train
  - b. Open the “Change Search” field to adjust dates, times, and locations
  - c. For airfare, change departure times to “Anytime” to search for all available flights





- d. Use the matrix, filter, search, and sort options to find the desired booking (See “[Submit a Request: ‘Look but Don’t Book’](#)” for tips on using the search features)
  - e. Car rental and lodging are skippable bookings; scroll down to the bottom of the page to find the skip option
  - f. Trip Summary provides booking progress and Total Estimated Cost after each segment
5. Review and Reserve [Segment]
    - a. Review, reserve, and add travel preferences after each segment
    - b. Airfare – Seat selection is available at this point; however, you can manage your seat preferences, including upgrades, directly through the carrier’s website or app once flight is ticketed

Trip Summary

**Flights Selected**

Round Trip  
FAI - SEA  
Depart: Tue, 10/20/2020  
Return: Sun, 10/25/2020

---

Finalize Trip

## Review and Reserve Flight

### REVIEW FLIGHTS

**DEPART** ✕ Tue, Oct 20 – Fairbanks, AK to Seattle, WA Hide details ^

Tue, Oct 20	01:30a FAI → 06:13a SEA	3h 43m	Alaska Airlines 156 73J
-------------	-------------------------	--------	----------------------------

**RETURN** ✕ Sun, Oct 25 – Seattle, WA to Fairbanks, AK / 3 layovers (SFO, PDX, ANC) Hide details ^

Sun, Oct 25	06:00a SEA → 08:15a SFO	2h 15m	Alaska Airlines 762 73J
	<i>Layover in San Francisco, CA</i>	🕒 4h 45m	<i>San Francisco Airport</i>
	01:00p SFO → 02:49p PDX	1h 49m	Alaska Airlines 1301 <small>Airbus Industrie A318/A319/320/321</small>
	<i>Layover in Portland, OR</i>	🕒 4h 56m	<i>Portland Airport</i>
	07:45p PDX → 10:28p ANC	3h 43m	Alaska Airlines 183 <span style="color: green;">📶</span> <small>Boeing 737-800 (winglets)</small>
	<i>Layover in Anchorage, AK</i>	47m	<i>Anchorage Ted Stevens Intl Airport</i>
	11:15p ANC 🌙 12:11a FAI <small>Lands Mon, Oct 26</small>	56m	Alaska Airlines 167 <small>Boeing 737-700 (winglets)</small>

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. ⓘ

**Primary Traveler** Edit | Review all

Name: TravelerOne Test Phone: 9075550000  ▼

---

**Frequent Flyer Programs** [Add a Program](#)

For Alaska Airlines  ▼

### SELECT SEATS

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

Flight	Seat
AS 156 Main (R)	Select a seat
AS 762 Main (R)	Select a seat
AS 1301 Main (R)	Select a seat
AS 183 Main (R)	Select a seat
AS 167 Main (R)	Select a seat

### REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$400.00	\$27.70	\$427.70
Total Estimated Cost:			\$427.70
Total Due Now:			\$427.70

### METHOD OF PAYMENT

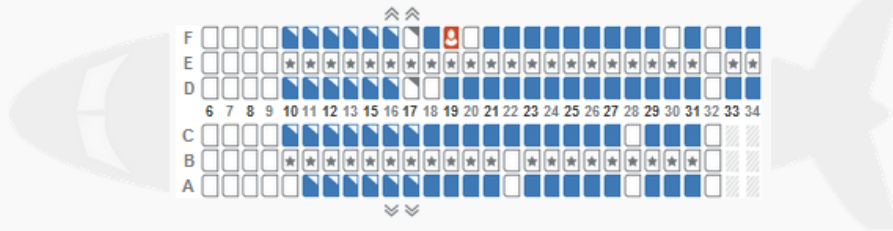
This purchase will be charged to your company directly.

**⚠ This is a Non-Refundable Ticket**  
 Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

### Seat Map

**19F** Seat over wing



Alaska Airlines #156, 73J, Fairbanks Intl Airport (FAI) - Seattle-Tacoma Intl Airport (SEA)  
 Seat assignment is subject to change up until time of departure

Available   
  Occupied or Unavailable   
  Selected   
  Exit row   
  No seating ⓘ

Preferential ⓘ   
  Preferential

Paid preferential ⓘ   
  Paid preferential

- c. Hotel
  - i. A UA corporate card is required to book through the booking tool; the card entered in your profile auto fills
  - ii. If you need CTM to reserve and pay for the hotel, “Skip Hotel” and enter lodging information on the Trip Booking Information screen
  - iii. Review the hotel’s cancellation policy before confirming

### SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Test Visa (...1111) ⌵ 🔗 Edit | [Add credit card](#)

---

\* Indicates credit card is a company card

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### ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

**Clarion Hotel Seattle Airport** *Clarion*

Please review the rate rules and restrictions before continuing.

**The hotel provided the following information:**

RATE: USD 78.50  
 TOTAL RATE: 439.93 USD  
 EXTRA PERSON: 10.00 USD - Extra adult charge

\*I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

- 6. Trip Booking Information
  - a. “Comments for the Travel Agent” box
    - i. If requesting CTM book and pay for the hotel, enter the full lodging information here
    - ii. Enter any other special requests or accommodations including directions to apply an unused ticket credit
    - iii. A comment of any kind (including “none”) incurs the \$10 partial touch fee
  - b. If comments to agent are added, booking is not complete until UA CTM agent acts
    - i. After-hours agents do not act on these
    - ii. If booking outside normal business hours, do not use this option unless booking can wait until next business day

## Trip Booking Information

Special travel agent requests may incur additional fees.

The trip name and description are for your record keeping convenience. If you have any special requests for the travel agent, please enter them into the agent comments section.

### Trip Name

This will appear in your upcoming trip list.

Slavik, J 10/20-10/25 SEA

### Trip Description (optional)

Used to identify the trip purpose

Concur Fusion 2020

### Comments for the Travel Agent (optional)

Special Requests may incur a higher service fee.

Do you want CTM to send payment for hotel? [Required]

You may HOLD this reservation until: 07/11/2020 09:30 pm Alaskan

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip

Hold Trip

<< Previous

Next >>

Cancel Trip

- Once booked, the final itinerary is provided with the option to Print or Email
- Depending on your email notification settings, you receive an email of the ticketed itinerary – this is the flight itinerary receipt required for your [expense] Report

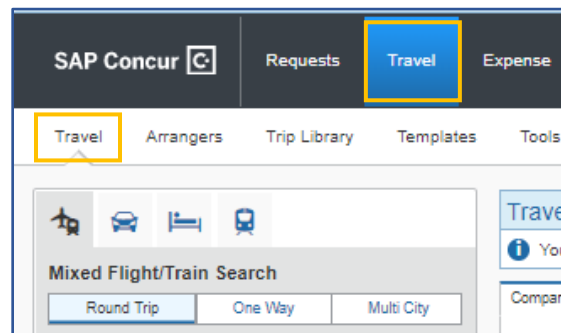
## From Travel

It is possible to initiate a booking directly from Travel. Doing so will generate a new Request to submit for approval. This option is called the “Travel-to-Request Integration” method and is ideal for last-minute or restricted-availability flights.

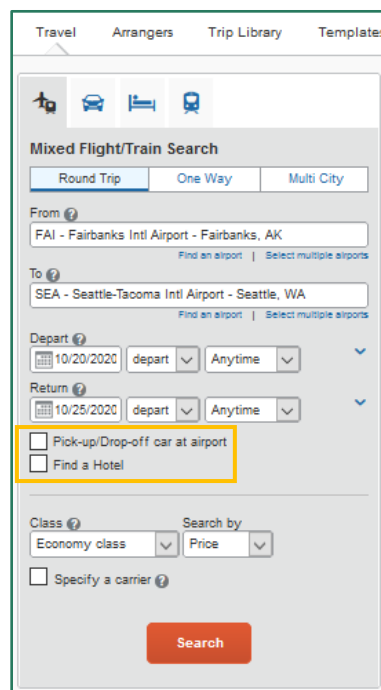
If using this method, you must remember that an approval time limit is placed on the Request. The booking is cancelled and the Request voided if not approved in time.

**Note:** If booking from Request is interrupted before completion (e.g. booking not completed in one sitting, you click on another browser during booking, the booking process sits idle for too long, etc.), the link between Travel and Request may break. When broken, the “Travel-to-Request Integration” method is initiated. Use the pending approval indicators in step four to recognize when this happens. The “Troubleshoot” scenarios at the end provided direction on how to resolve an accidental break.

1. Enter your booking information in the booking tool of the Travel module



- a. Select “Pick-up/Drop-off car at airport” to add rental car to airfare
- b. Select “Find a Hotel” to add hotel to airfare

This screenshot shows the 'Mixed Flight/Train Search' form in detail. The 'From' field is set to 'FAI - Fairbanks Intl Airport - Fairbanks, AK' and the 'To' field is 'SEA - Seattle-Tacoma Intl Airport - Seattle, WA'. The 'Depart' date is 10/20/2020 and the 'Return' date is 10/25/2020. Below the date fields, there are two checkboxes: 'Pick-up/Drop-off car at airport' and 'Find a Hotel', both of which are highlighted with a yellow box. The 'Class' is set to 'Economy class' and the search is filtered by 'Price'. A 'Search' button is located at the bottom of the form.

2. Proceed with reservations as usual (See “[Book a Trip: From Request](#)” for a walkthrough)
  - a. Airfare is put on hold
  - b. CTM charges the \$1.50 PNR fee
  - c. Itinerary information clearly indicates tickets are not yet issued

**Totals and restrictions**

Airfare quoted amount:	\$400.00 USD	
Taxes and fees:	\$27.70 USD	
<b>Airfare quoted total:</b>	<b>\$427.70 USD</b>	<a href="#">View Fare Rules</a>

Restrictions: NONREF/SVCCHGPLUSFAREDIF/CXL BY FLT TIME OR NOVALUE/VALID AS/

**TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.**

Itinerary generated on Fri 07/10/2020 5:45 PM

**If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.**

Next >>
Cancel Trip

Trip Summary

✔ **Finished!**

Do not close your browser, you will be forwarded to your Travel Request in a few seconds. Don't forget to Submit it for approval. [Click here](#) in order to reach your Travel Request directly.

**Trip Record Locator : UDEOEK**

**This trip is awaiting approval and must be approved by: 07/11/2020 07:30 pm Alaskan**  
**It will be automatically cancelled if it is not approved by that time.**  
**The itinerary will not be ticketed until your travel manager has approved the trip.**  
 Your itinerary has been saved. CTM NA (University of Alaska - PAC) will service your itinerary.  
**Please Note:** Fares are not guaranteed until tickets are issued and are subject to change without notice.  
 Airfare must be ticketed by: 07/11/2020 09:30 pm Alaskan ( 7/11/2020 10:30:00 PM Pacific ).

3. A blank Request to fill out & submit is initiated
  - a. The Request only auto populates the Segments and Expenses information from your booking
  - b. The Request Header and remaining Expenses are filled in by you
4. The Request has an approval time limit that corresponds with the amount of time the airline will hold the flight
  - a. Provided in red text at the top of the Request

## Request 4343

Trip Name: Trip from Fairbanks to Seattle  
Trip Description: AGU Meeting

Attachments ▾
Print / Email ▾
Cancel Request
Recall

Status: Submitted & Pending Approval by your Supervisor  
**To be approved before: 07/11/2020 07:30 pm**  
 Amount: \$306.20

- b. Provided as “Status” under My Trips>More
  - c. “Approval of Request Required” documented in Trip Library
5. If the Request is approved in time
  - a. The flight is ticketed and no further action to book is needed
  - b. Depending on your email notification settings, you receive an email of the ticketed itinerary – this is the flight itinerary receipt required for the [expense] Report
6. If the Request is not approved in time, the hold cancels, and the Request expires
  - a. You can copy and submit a new Request for approval
  - b. You must book from the new Request
  - c. The travel office cannot re-engage the Request once it expires

## Troubleshoot

**Problem:** Started from Travel instead of Request, but already have an approved Request.

**Solution:** Complete and submit the Request generated from the booking. Contact your department travel coordinator or campus travel finance office. The campus Processor will approve the Request which completes the booking. They will also move the original Request out of “Pending on-line Booking” status.

Close/Inactivate the erroneous Request generated from the booking and use the original Request for the [expense] Report.

**Problem:** Started booking from approved Request, but a new Request is initiated.

**Solution:** If the booking is interrupted before completion (e.g. booking not completed in one sitting, the user clicks on another browser during booking, the booking process sits idle for too long, etc.), follow the same steps as though the booking was initiated from Travel instead of approved Request.

## Personal Travel

Travelers may coordinate personal travel arrangements in conjunction with their UA business travel. This includes personal extended stays at the business location and personal deviations to a non-business location. You have the option of booking some or all portions in the booking tool depending on the type of personal travel.

In both cases, a business-only cost comparison itinerary is used to define business travel status and allowable costs. Any costs that exceed the business-only comparison are deducted from your out-of-pocket reimbursable expenses. If the additional cost exceeds the reimbursable amount, a payroll deduction is used to recoup the additional amount from employees.

Personal travel not associated with a UA business trip is not bookable through Concur, CTM, or UA personnel.

### Extended Stay

When a traveler extends their stay at the UA business destination(s) for personal reasons, it is a personal deviation with an extended stay.

Since UA receives State of Alaska contract rates when booking travel through Concur or CTM, travel that includes personal days is only bookable through Concur if it is an extended stay at the business or intermediate location.

### Personal Deviation

When a traveler goes to an additional destination outside of the UA business routing or destination(s), it is considered a personal deviation with a routing change.

Our contract rates are not applicable on travel to a non-business location. Additionally, it is not appropriate to ask UA personnel to help with your personal travel arrangements.

**Business Portion:** Booked through the booking tool or by calling CTM

**Personal Portion:** Booked separately by you

# Submit a Report

The Expense module is used to manage expenses, receipts, and expense reports. The [expense] Report is the official document for approving travel costs and dates associated with an authorized trip. It provides final documentation of the trip as it happens including detailed itemization of costs and modifications made after the Request was approved.

A Report is required to reconcile any charges or refunds to the agency card held by CTM and the UA travel card held by employees. You should submit your Report within 15 business days of trip completion.

It is recommended to start the Report as soon as the “Expense” link is available on your Request. This helps you manage your expenses on the go.

## From Request

1. Click the “Expense” link under the Action column of the Request; use the View drop-down menu to change the filter if your Request is not listed under Active Requests

Request Name	Begins With	Go							
<input type="checkbox"/>	<b>Request Name</b>	<b>Request ID</b>	<b>Status</b>	<b>Request Dates</b>	<b>Date Submitted</b>	<b>Total</b>	<b>Approved ...</b>	<b>Remainin...</b>	<b>Action</b>
<input type="checkbox"/>	Slavik, J 10/20-10/25 SEA Concur Fusion 2020	4339	Approved	10/20/2020	07/09/2020	\$1,350.00	\$1,350.00	\$1,350.00	Expense

2. Verify the Header information from the Request is still accurate and click Next
  - a. The information auto populates from the Request Header
  - b. Make any corrections based on changes since original trip approval

**Create a New Expense Report**

Report Header

Trip Name Slavik, J 10/20-10/25 SEA	Trip Purpose Professional Development	Trip Description Concur Fusion 2020	Trip Type Alaska	Traveler Type Staff	Comments
Business Travel Start Date 10/20/2020	Business Travel End Date 10/25/2020	Did this trip include personal travel? Yes	Personal Travel Dates 10/26-11/2		
Are any expenses being paid by an external source? Partially arranged/paid by e	Name of external source Concur	Estimated amount to be paid by the external source 500.00			
Fund (101010) SW General Funds	Org (80042) Financial Systems	Department (D8FNSY) SW Financial Sy	Campus (SW) University of Alaska	Activity Code	
<input type="checkbox"/> Check to acknowledge that you owe the university money	Report Key				

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
Slavik, J 10/20-10/25 SEA	4339	No	\$1,350.00	\$1,350.00	\$1,350.00



3. Answer “Yes” to the per diem question if this is the first Report for a completed trip even if you are not claiming per diem reimbursement (the Travel Allowance is the official documentation of your time in travel status)

4. Enter the Travel Allowance based on the business-only itinerary and create per diem expenses if needed (See “[Submit a Report: Travel Allowance](#)” for a walkthrough)
5. Add UA pre-paid and out-of-pocket reimbursable Expenses from the trip
  - a. Itemize expenses as needed (See “[Submit a Report: Itemize](#)” for a walkthrough)
  - b. Allocate expenses as needed
    - i. Select one or more expense and click “Allocate”
    - ii. If assigning the full cost of selected expense(s) to one funding source different from the primary funding on the Report Header, enter the funding information and Save
    - iii. If assigning the cost of selected expense(s) to multiple funding sources, use “Add New Allocation” to enter split funding information and Save

Allocations							Total:\$250.00	Allocated:\$250.00 (100%)	Remaining:\$0.00 (0%)
Allocate By: ▾		Add New Allocation		Delete Selected Allocations	Favorites ▾	Add to Favorites			
<input type="checkbox"/> Percentage	* Fund	* Org	* Department	* Campus	Activity Code	Code			
<input type="checkbox"/> 50	(101010) SW ...	(80042) Finan...	(D8FNSY) S...	(SW) Univers...		101010-80042-...			
<input checked="" type="checkbox"/> 50	(103010) UA...	(18114) VCA...	(D1ASA) VC...	(UAA) Univer...		103010-18114-...			

- iv. If needed, select additional expenses to allocate and click “Allocate Selected Expenses”

- v. Allocated expenses are indicated by the blue pie chart icon



6. Attach receipts and other pertinent or required documentation
  - a. You can attach receipts to the Report at any approval stage
  - b. Itemized receipts are required for all expenses except “Per Diem Offset Meal” or “Personal/Non Reimbursable”
7. Verify all information is complete and correct then click “Submit Report” (top right-hand corner)
  - a. View Report totals from the Details drop-down menu
  - b. Amount Due Employee = Reimbursement UA owes you (if any)
8. Concur evaluates the Report according to audit rules defined by UA regulations and guidance
  - a. If no Exceptions are present, the Report is submitted for approval
  - b. If Exceptions are present
    - i. The Report is not submitted, and Concur provides information on and recommended resolution for the Exceptions
    - ii. Make the required corrections and click “Submit Report” again to re-evaluate the audit flags

Exceptions			
Expense Type	Date	Amount	Exception
N/A			Action: You are not permitted to enter future dated expenses.
Airfare	07/10/2020	\$306.20	Upload your receipts to the expense line item using the Attach Receipt Images. In order for the red flag to be re-evaluated, you will need to click the Submit link again.

9. Depending on your email notification settings, you receive an email notification of Report submission, return, and/or approval
10. Once approved for payment, the Report moves off your Active Reports list and is stored in your Report Library

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense' (selected), 'Approvals', and 'App Center'. A 'Profile' dropdown is visible on the right. Below the navigation bar, there are three sub-tabs: 'Manage Expenses' (selected), 'View Transactions', and 'View Cash Advances'. The main content area displays 'Manage Expenses' and 'ACTIVE REPORTS'. A yellow box highlights a 'Report Library' link with a right-pointing arrow.

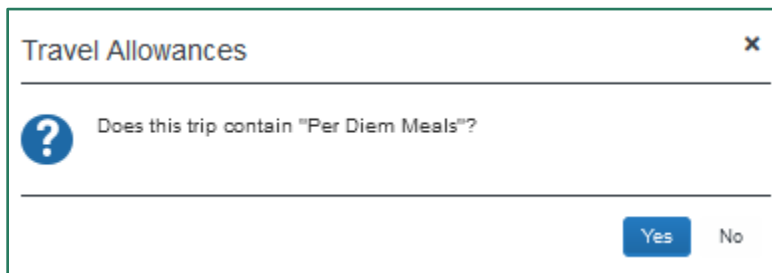
## Travel Allowance

All Reports for completed trips should include a Travel Allowance. The Travel Allowance defines your time in travel status, applies the meal & incidental expenses (M&IE) allowance, and determines the allowable lodging rate. The latter two purposes are why a Travel Allowance is required for all trips with lodging and/or meal expenses.

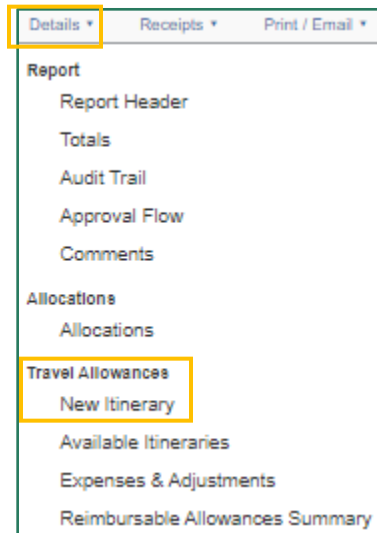
The allowable rate for your first day of travel is based on the GSA listed rate for the city where you lodged. The allowance for your last day is based on the rate for the last city you lodged.

If no travel commenced, a Travel Allowance is not entered. For example, Reports to reconcile expenses from a cancelled trip or accidental card charges. Do not enter a Travel Allowance if you were not in travel status.

1. The Travel Allowance is prompted when you create a Report
  - a. Answering “Yes” to “Does this trip contain ‘Per Diem Meals?’” initiates the Travel Allowance



- b. If the Report is already created, you can assign the Travel Allowance from the Details drop-down menu



2. In Create New Itinerary, enter the outbound and return itinerary information (start and end locations, dates, and times)
  - a. Click Save after entering each leg
  - b. Use the time you departed from or returned to your home/duty station
  - c. If your trip includes personal time, enter the business-only itinerary from the cost comparison
  - d. Anytime flights cross date lines, the layovers are excluded unless you stopped and lodged there for the night

**Note:** Including personal days in the Travel Allowance results in inaccurate calculations on your allowable per diem. Including layovers/intermediate stops may also result in inaccurate per diem calculations.

For example, in the following screenshots, the actual itinerary includes an extended stay at the business location and a layover in Anchorage on the return. The itinerary entered reflects the business-only travel dates and excludes layover stops.

Travel Allowances For Report: Slavik, J 10/20-10/25 SEA

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Itinerary Info

Itinerary Name Selection  
Slavik, J 10/20-10/25 SEA USGSA

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arrival Rate Loca...
No Itinerary Rows Found		

New Itinerary Stop

Departure City  
Fairbanks, Alaska

Date Time  
10/20/2020 5:00 AM

Arrival City  
Seattle, Washington

Date Time  
10/20/2020 10:00 AM

Save

Travel Allowances For Report: Slavik, J 10/20-10/25 SEA

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

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25 SEA | Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Loca...
<input type="checkbox"/>	Fairbanks, Alaska 10/20/2020 05:00 AM	Seattle, Washington 10/20/2020 10:00 AM	KING COUNTY, U...

**Enter Return Itinerary**

New Itinerary Stop

Departure City: Seattle, Washington

Date: 10/25/2020 | Time: 11:00 PM

Arrival City: Fairbanks, Alaska

Date: 10/26/2020 | Time: 3:00 AM

Save

3. Once the itinerary is complete, click Next

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25 SEA | Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Loca...
<input type="checkbox"/>	Fairbanks, Alaska 10/20/2020 05:00 AM	Seattle, Washington 10/20/2020 10:00 AM	KING COUNTY, U...
<input type="checkbox"/>	Seattle, Washington 10/25/2020 11:00 PM	Fairbanks, Alaska 10/26/2020 03:00 AM	FAIRBANKS, US-...

New Itinerary Stop

Departure City: Fairbanks, Alaska

Date: | Time: |

Arrival City: |

Date: | Time: |

Save

Go to Single Day Itineraries | **Next >>** | Done

**Hot Tip:** Selecting Import Itinerary provides some available trip itineraries. If the correct itinerary is available and assigned, this negates the need to manually enter each leg.

Travel Allowances For Report: Slavik, J 10/20-10/25 SEA

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25 SEA Selection: USGSA

Add Stop Delete Rows Import Itinerary

Select trips and charges to use to create this itinerary

<input type="checkbox"/>	Description	Start Date	End Date
<input type="checkbox"/>	Ramada	05/20/2020 11:59...	05/21/2020 11:59...
<input checked="" type="checkbox"/>	Best Western International	05/21/2020 11:59...	05/28/2020 11:59...
<input type="checkbox"/>	Courtyards	07/15/2020 11:59...	07/20/2020 11:59...
<input type="checkbox"/>	Best Western International	09/01/2020 11:59...	09/14/2020 11:59...

Import Cancel

4. Verify the itinerary is correct and click “Next”

Travel Allowances For Report: Slavik, J 10/20-10/25 SEA

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Slavik, J 10/20-10/25 SEA				
Fairbanks, Alaska	10/20/2020 05:00 AM	Seattle, Washington	10/20/2020 10:00 AM	KING COUNTY, US-WA...
Seattle, Washington	10/25/2020 11:00 PM	Fairbanks, Alaska	10/26/2020 03:00 AM	FAIRBANKS, US-AK, US

Available Itineraries

Current Itineraries [v] Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous Next >>

5. In Expenses & Adjustments, review M&IE allowances and click “Create Expenses” to assign the Travel Allowance to your Report
  - a. Concur calculates the business location GSA rate and displays the daily allowable M&IE in Expenses & Adjustments
  - b. You can exclude provided meals, full days, or all per diem by checking the associated boxes
  - c. The Allowance column provides total daily M&IE after deducting provided meals or excluded days

Travel Allowances For Report: Slavik, J 10/20-10/25 SEA

[Create New Itinerary](#)
[Available Itineraries](#)
[Expenses & Adjustments](#)
[Reimbursable Allowances Summary](#)

Show dates from  to  [Go](#)

<input checked="" type="checkbox"/> Exclude   All <input type="checkbox"/>	Date/Location ▲	Meals Rate	Breakfast Provi...	Lunch Provided	Dinner Provided	Allowance
<input checked="" type="checkbox"/>	10/20/2020 Seattle, Washing...	\$57.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
<input type="checkbox"/>	10/21/2020 Seattle, Washing...	\$78.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$57.00
<input type="checkbox"/>	10/22/2020 Seattle, Washing...	\$78.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$57.00
<input type="checkbox"/>	10/23/2020 Seattle, Washing...	\$78.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$57.00
<input type="checkbox"/>	10/24/2020 Seattle, Washing...	\$78.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$23.00
<input type="checkbox"/>	10/25/2020 Seattle, Washing...	\$78.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$78.00
<input type="checkbox"/>	10/26/2020 Seattle, Washing...	\$57.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$5.00

[<< Previous](#)
[Create Expenses](#)
[Cancel](#)

6. “Daily Per Diem” based on the Travel Allowance generates as expenses on your Report

Slavik, J 10/20-10/25 SEA

[+ New Expense](#) [Import Expenses](#) [Details ▾](#) [Receipts ▾](#) [Print / Email ▾](#)

Expenses [Move ▾](#) [Delete](#) [Copy](#) [View ▾](#)

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	10/26/2020	Daily Per Diem Seattle, Washington	\$5.00	\$5.00
<input type="checkbox"/>	10/25/2020	Daily Per Diem Seattle, Washington	\$76.00	\$76.00
<input type="checkbox"/>	10/24/2020	Daily Per Diem Seattle, Washington	\$23.00	\$23.00
<input type="checkbox"/>	10/23/2020	Daily Per Diem Seattle, Washington	\$57.00	\$57.00
<input type="checkbox"/>	10/22/2020	Daily Per Diem Seattle, Washington	\$57.00	\$57.00
<input type="checkbox"/>	10/21/2020	Daily Per Diem Seattle, Washington	\$57.00	\$57.00

7. Access the Travel Allowance from the Details drop-down menu to Edit or Unassign the information
- Only unsubmitted Reports are changeable
  - Click Update Expenses on the Expenses & Adjustments tab to recalculate M&IE allowances
  - The “Daily Per Diem” expense is not editable under Expenses



## Itemize

Some expenses require itemizations to separate “child” Expense Types from the “parent.” This is primarily used for “Lodging” expenses as they contain nightly charges for the lodging rate, taxes, and fees. However, the itemization process is also used when the expense includes personal portions or when multiple Expense Types apply to a single charge.

For example, the business + personal airfare is purchased on the agency card, but the business-only itinerary costs less. You can create an expense for the full amount and itemize the expense, creating two itemizations: one for the business-only airfare cost and one for the additional personal cost.

**Note:** Transaction Date, Amount, Expense Type, and additional information are adjustable on the individual “child” itemizations even on agency and travel card charges.

1. Add the “Lodging” expense and click Itemize

The screenshot shows a 'New Expense' form with the following details:

- Expense Type: Lodging
- Transaction Date: 07/20/2020
- Payment Type: Out-of-Pocket
- Amount: 921.95 USD
- Vendor: Courtyards
- Lodging Location: Seattle, Washington
- Trip Purpose: Professional Development
- Travel Allowance:
- Comment: (empty text box)
- Trip Type: Alaska
- Traveler Type: Staff
- Request: 10/20/2020, \$200.00 - Slavi

At the bottom right, the 'Itemize' button is highlighted with a yellow box.

2. The Nightly Lodging Expenses tab activates
  - a. Use the calendar to select your check-in and check-out dates (number of nights auto-calculates)
  - b. Enter the room rate, taxes, and other recurring charges
    - i. Enter the average nightly rate in the charged currency
    - ii. Do not worry if there are different rates for different nights – entering the average is fine

Expense **Nightly Lodging Expenses** Available Receipts

Check-in Date: 10/20/2020 Check-out Date: 10/25/2020 Number of Nights: 5

**Recurring Charges (each night)**

Room Rate: 140.00 Room Tax: 17.50

Other Room Tax 1: Other Room Tax 2:

Room rate and taxes will be shown as separate expenses

**Additional Charges (each night)**

Expense Type: Lodging Fees Amount: 3.10

Expense Type: Choose an expense type Amount:

Save Itemizations Cancel

- iii. Do not worry if the total cost does not divide evenly – individual itemization amounts are adjustable once Nightly Lodging Expenses is saved

Expense Type	Transaction Date	Amount	USD
Lodging Fees	10/24/2020	3.11	USD
Lodging	10/24/2020	140.00	USD
Lodging Tax	10/24/2020	17.50	USD
Lodging Fees	10/23/2020	3.10	USD
Lodging	10/23/2020	140.00	USD
Lodging Tax	10/23/2020	17.50	USD
Lodging Fees	10/22/2020	3.10	USD
Lodging	10/22/2020	140.00	USD
Lodging Tax	10/22/2020	17.50	USD
<b>TOTAL AMOUNT</b>		<b>\$1,360.20</b>	
<b>TOTAL REQUESTED</b>		<b>\$1,360.20</b>	

Save

3. Concur calculates and provides any remaining amount unaccounted for in the itemizations

Total Amount: \$921.95 | Itemized: \$803.01 | Remaining: **\$118.94**

- a. Correct the costs in the Nightly Lodging Expenses tab or
- b. Add a one-time charge itemization(s)

Save Add Itemization Attach Receipt Cancel

New Itemization

Expense Type  
Choose an expense type

New Itemization

Total Amount: \$921.95 | Itemized: \$803.01 | Remaining: **\$118.94**

Expense Type: Per Diem Offset Meal  
Transaction Date: 07/20/2020  
Payment Type: zNotUsed-IBCP  
Amount: 118.94 USD  
Comment: Room Service

Save Cancel

4. "Child" expenses are itemized under the "parent" expense

<b>"Parent"</b>	<input checked="" type="checkbox"/>	07/20/2020	<b>Lodging</b>	\$921.95	\$803.01
			Courtyards, Seattle, Washingto		
<b>"Child"</b>	<input type="checkbox"/>	10/24/2020	Per Diem Offset Meal	\$118.94	\$0.00
	<input type="checkbox"/>	10/24/2020	Lodging Fees	\$3.11	\$3.11
	<input type="checkbox"/>	10/24/2020	Lodging	\$140.00	\$140.00
	<input type="checkbox"/>	10/24/2020	Lodging Tax	\$17.50	\$17.50
	<input type="checkbox"/>	10/23/2020	Lodging Fees	\$3.10	\$3.10
	<input type="checkbox"/>	10/23/2020	Lodging	\$140.00	\$140.00
	<input type="checkbox"/>	10/23/2020	Lodging Tax	\$17.50	\$17.50

## Personal Travel

Travelers may coordinate personal travel arrangements in conjunction with their UA business travel. This includes personal extended stays at the business location and personal deviations to a non-business location.

You must identify on the Report personal days taken in conjunction with UA business travel. For this reason, the Report Header includes a section for documenting your personal days. Remember to update the Report Header if personal time was added to or removed from your approved Request.

Expenses accrued during or because of personal days are not reimbursable. The Travel Allowance must reflect the business-only itinerary from the cost comparison/past fare quote to accurately calculate business-only per diem allowances. Expenses paid on the agency or travel card must reflect the correct Expense Type. Out-of-pocket expenses must reflect only those incurred for the business purposes of the trip.

### Agency/Travel Card

Personal expenses paid on the agency or travel card are deducted from your total reimbursable amount. If your personal expenses exceed your reimbursable amount, a payroll deduction is used to recoup the additional amount from employees. (Please work with your department to directly reimburse UA if you are no longer an employee.)

Personal expenses paid on the agency or travel card during travel are documented as Expense Type “Personal/Non Reimbursable,” even if a different Expense Type would apply if it were a business expense. If the expense is only partially personal, use the [Itemize](#) feature to separate the business from the personal portion.

Example of business + personal airfare when the business-only cost comparison is less:

Comment History			Expense Item			
Date ▼	Entered By	Comment Text	Date	Expense Type	Business Cost	Personal Cost
07/21/2020	Test, TravelerOne	Additional cost for business+personal	07/10/2020	Airfare	\$308.20	\$250.00
			07/10/2020	Airfare	\$250.00	\$250.00
			07/10/2020	Personal/Non Reimbursable	\$58.20	\$0.00

Example of lodging that includes three nights of personal days:

1. Use the Nightly Lodging Expenses tab to enter the business-only expenses
  - a. Use the business dates for Check-in and Check-out

Check-in Date	Check-out Date	Number of Nights
07/15/2020	07/20/2020	5

- b. Use the average rates of the business-only expenses

**Recurring Charges (each night)**

Room Rate: 120.00  
 Room Tax: 18.00  
 Other Room Tax 1:   
 Other Room Tax 2:

Room rate and taxes will be shown as separate expenses

**Additional Charges (each night)**

Expense Type: Choose an expense type (dropdown) Amount:   
 Expense Type: Choose an expense type (dropdown) Amount:

- 2. Calculate the total amount of your personal lodging expenses and add a single “Personal/Non Reimbursable” itemization

Save Add Itemization Attach Receipt Cancel

New Itemization

Expense Type: Choose an expense type (dropdown)

Expense Type: Personal/Non Reimbursable (dropdown)  
 Transaction Date: 07/14/2020 (calendar icon)  
 Payment Type: zNotUsed-IBCP (dropdown)  
 Amount: 231.95 USD (dropdown)  
 Comment: Additional personal nights of stay  
 Request: 10/20/2020, \$50.00 - Slavik (dropdown)

07/20/2020	Lodging Courtyards, Seattle, Washingto	\$921.95	\$890.00
07/14/2020	Personal/Non Reimbursable	\$231.95	\$0.00
07/15/2020	Lodging	\$120.00	\$120.00
07/15/2020	Lodging Tax	\$18.00	\$18.00

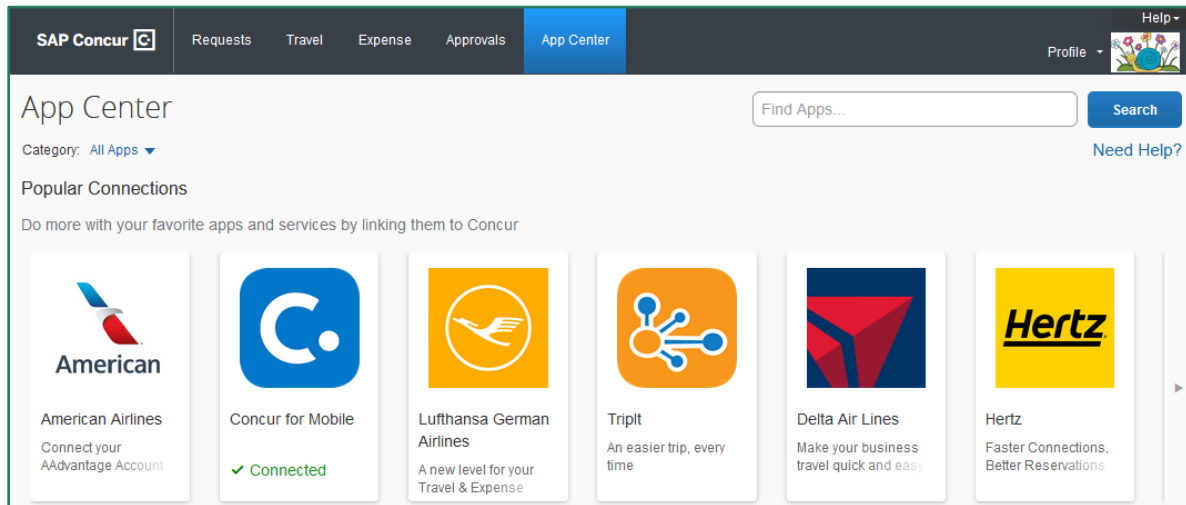
### Out-of-Pocket

The Report is used to document UA paid expenses. Personal expenses paid out-of-pocket are excluded from your Report unless the expense is only partially personal. In which case, only the business portion is documented or the Itemize feature is used to separate the business from personal portion.

# Mobile Tools

Tools for the on-the-go travelers to manage your travel and expenses on a mobile device.

Use the Concur App Center module to link available apps with your Concur account.



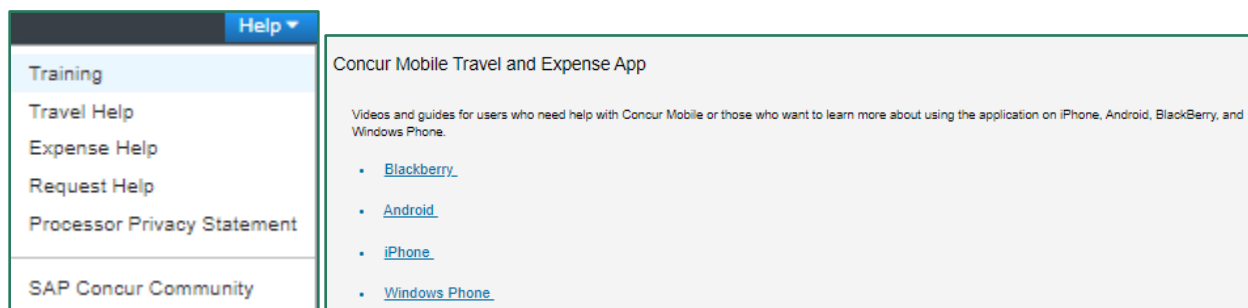
## SAP Concur App

The following functions are available through the mobile app:

1. Trips – View itinerary information for upcoming trips loaded into Concur
2. Expenses – Manage expenses in Available Expenses
3. Expense Reports – Create, review, and submit Reports
4. Approvals – Approve Requests and Reports as COA or Supervisor
5. Requests – Create, review, and submit Requests
6. ExpenseIt – Upload documents to Available Expenses using the phone's camera

Since use of these functions can vary with phone type, specifics for using the features are not covered in this guide. Instead, you should access the mobile app training videos and guides from Concur.

Select Training from the Help drop-down menu in the upper right-hand corner of the Concur dashboard. Select the desired phone type from Concur Mobile Travel and Expense App.



## Mobile App Setup

1. Download SAP Concur Travel app through the mobile device app store
2. Access mobile login options through the Concur desktop
  - a. View Profile Settings>Concur Mobile Registration
  - b. Setup the UA SSO login option by entering the company code in the mobile app or
  - c. Setup the CTE Login by assigning a PIN

Concur Mobile

Manage your expenses and business travel on your mobile device.

To get started, enter your email address below and we will send you a link to download the app.

Or, review your sign-in details:

To sign in to the Concur Mobile app, simply tap on "Company Code Sign In" after downloading the Concur Mobile app and enter your company code. Then follow the instructions per your company procedure for single sign on.

**Company Code:** YNXGH  
Alternatively, you can use your Concur username and a Concur Mobile PIN.  
Enter a new Concur Mobile PIN in the fields below to setup a new one.

**Concur Username:** jrslavik@alaska.edu

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

Retype PIN:

## Triplt Pro

The following are functions included in TripIt Pro:

1. Keep all your travel plans in one place
2. Selectively share travel plans
3. Receive real-time flight alerts
4. Find out when a better seat is available
5. Manage travel reward program points in one spot

## Mobile App Setup

1. Download and activate the SAP Concur mobile app
2. Visit the App Center in the Concur desktop
  - a. Select the TripIt app option
  - b. Connect the TripIt app to link it to the user's Concur account
3. Download the TripIt app to access the free Pro subscription
4. Login with the CTE Login and password created when connecting TripIt through the App Center