HELPFUL HINTS
Concur is the university and state college travel application within which employees from each campus will utilize the same travel tools. All travel requests, expense reports, and approvals will be processed through Concur.

Concur travel request, expense, and approval applications provide a complete travel program along with Concur travel booking. Assistance for Concur travel booking, managed by Travel & Transport, can be accessed from the company notes section within the Concur application.

ASSISTANCE WITH USING CONCUR
Pages 1 to 2

TRAVEL POLICY QUESTIONS
Pages 2 to 8

USING THE CONCUR APPLICATION AND MOBILE APP
Pages 8 to 11

For assistance:
Melody Stark
traveloffice@nebraska.edu
melody.stark@nebraska.edu

Travel request, expense, & approval help website
https://nebraska.edu/concur-help

Travel help phone line
402-472-5610

Questions on expense reporting and allowable trip expenses – contact the Accounts Payable/Payment Services office.

UNK
308-865-8419
acctspay@unk.edu

UNL
402-472-2881
ap@unl.edu

UNMC
402-559-8950
travelservices@unmc.edu

UNO
402-554-2320
unoaccountspayable@unomaha.edu

CSC
Jordan Heiting
308-432-6415
jheiting@csc.edu

PSC
Kaylee Kreifels
402-872-2361
kkreifels@peru.edu

WSC
Angela Ohrich
402-375-7089
anohlri1@wsc.edu

NSCS System Office
Matt Eash
402-471-2505
meash@nscs.edu

TRAVEL ASSISTANCE
Q: Is there a contact person or help desk where I can get help with questions about creating travel requests and entering/submitting expenses?
A: Yes. You can contact Melody Stark, call the travel help phone line, contact your accounts payable/payment services office, or contact your campus Concur training leads(s).
POLICY CONTENT INVOLVING CONCUR

Q: What does the University of Nebraska travel policy entail?
A: The NU travel policy includes pre-travel requirements; protocols for transportation, lodging and meals; guidelines for international travel and travel with students; expense reimbursement; and other key areas related to University travel, many of which are operationalized through the Concur software.

Q: What does the Travel Policy do?
A: The NU travel policy, operationalized through Concur, create a uniform process – from travel approval through reimbursement – for faculty and staff traveling on University business and employees processing related expenses. It also ensures compliance with federal and state statutes and relevant requirements for international travel.

Q: What are some ways in which the new NU travel policy differs from other previous policies on individual campuses?
A: Travelers are required to submit their own travel requests and expense reports. A travel coordinator (delegate) may create/save a travel request or expense report, however Concur requires the traveler to sign in to the application to submit the document.

  Approvers are required to log into Concur to approve travel requests or expenses (no longer able to complete via email).

  Travel coordinators are titled "delegates" in Concur and will need to be set up by each traveler (no longer set up by SAP Security).

PREPARING TO TRAVEL USING CONCUR

Q: Why do I have to fill out a Travel Request even if I will not have any expenses for which I am asking for reimbursement from the University?
A: Every business traveler is required to have a travel request on file regardless of source of reimbursement. This enables travelers to be covered by University insurance while in travel status and makes it possible for the university to contact travelers in case of an emergency.
Q: The travel policy mentions a personal travel profile. What is that?
A: Travel profiles in Concur are similar to those being used on all campuses already – name, travel preferences, department, default cost center, job title, etc. This information will be stored in our system-wide software system, Concur.

Q: Why do I have to document information such as any health conditions in my travel profile? Who will have access to such information?
A: Health condition information provides background for special travel-related accommodations regarding air travel, hotels etc. The details related to such accommodations should be on file with the employee’s respective ADA/504 coordinator. No specific health conditions or medical information will be shared beyond the ADA/504 office. Travelers who have an accommodation plan on file are asked to note its existence in the comment section of the travel profile form, e.g. accommodation is on file with ADA/504 office.

Q: According to the travel policy, travel “must be self-reported… prior to the trip…” How do I submit the pre-authorization?
A: All travelers must complete a Pre-Trip Authorization (travel request) through Concur to be considered for reimbursement. Pre-authorized travel is a continuation of long-standing travel practices on all campuses. With the adoption of Concur, those authorizations will be uploaded through the Concur software. This authorization must be submitted BEFORE the travel booking occurs for reimbursements to be considered.

Q: The travel policy states that “more restrictive” policies may be developed by individual campuses, colleges, and units.” Why would this occur? What recourse do I have if I disagree with these restrictions? Where will such restrictions be posted?
A: This policy is not new to any campus and is an extension of long-standing policy at the University. Departments and centers have always had the opportunity to enforce stricter policies for cost-saving or programmatic purposes at the individual unit level. Any questions or concerns regarding these unit-level policies should be discussed with your unit administrator or dean. Such restrictions are accessible through unit-level websites and/or other unit-level documents.

Q: The travel policy states that an employee’s travel privileges may be restricted if the policy is not followed. What does that mean? Who will be responsible for determining and enforcing such restrictions?
A: Each employee’s supervisor(s) and administrator(s) are ultimately responsible for monitoring travelers’ compliance with required travel policy. If authorizations and/or expenses are not submitted in accordance with approved policy and procedures, employees may not be reimbursed or their future access to university funds may be restricted as determined by their supervisor.

PERSONNEL QUESTIONS RELATED TO CONCUR

Q: What is the difference between a travel supervisor approver, a financial approver, a travel arranger and a travel delegate? How do these people interact with me and my travel plans or reimbursements?
A: Supervisor Approver – This is a University employee who oversees the time and duties of specific University travelers. The supervisor is responsible for reviewing and approving the employee’s Pre-Trip Requests within the context of the travelers’ duties and assignments.

Financial Approver – This is a University employee who oversees, regulates and approves all expenses from a specific University funding source(s) and is responsible for:

- Reviewing Pre-Trip Requests prior to approval to ensure the Traveler has approved, budgeted funding for the specific trip and expense estimates;

- Verifying expenses incurred are in accordance with travel policy and procedures.

- Authorizing payments for travel expenses on behalf of the employee.
• Reviewing actual, submitted expenses prior to approving reimbursements to ensure that funds are allocated correctly; and,
• Ensuring compliance with the NU Travel Policy and all other campus, college and/or unit-specific policies

Travel Arranger – This is a person who can book airline tickets, reserve hotels and cars, as well as make other travel arrangements on behalf of the traveler.

Travel Delegate – This is a person assigned by the traveler to act on the traveler’s behalf in filling out travel requests, compiling receipts, and filling out expense forms in Concur. The delegate forwards these records to the traveler for the traveler’s approval and final submission.

Often the Travel Arranger and the Travel Delegate are one and the same person, but not always.

CONCUR SOFTWARE

Q: What is Concur? Why is it being deployed?
A: The Concur software is associated with SAP, the software that runs most business operations on all NU campuses and our statewide operations. The pre-trip Concur functions have been in place for 10+ years. However, the Concur expense function is new and is being treated as an upgrade that will facilitate automation (reducing laborious paperwork) for both business office employees and for travelers.

Until now, the University of Nebraska has had no standard process for submitting travel expense reports across all NU-related entities. The resulting disparate practices for report submission and tracking resulted in a people-, paper-, and time-intensive process that did not fully take advantage of current technologies. The Concur software system is the dominant market leader in the travel and expense reporting space with over 400 universities and 40,000 other entities in their customer base. Big Ten and other higher education clients include Michigan State, Purdue, Penn State, Colorado, the University of Oklahoma, the University of Michigan, MIT, Harvard, and Princeton. Local clients include Kiewit, Berkshire, First National Omaha, and Mutual of Omaha.

Additional information about using Concur is available at the travel help website (https://nebraska.edu/offices-policies/concur-help)

Q: Do I have to book my international rail service, international air service or other forms of international transport in Concur?
A: Often booking inter-country airlines/rail services (or other forms of transport such as ferries, etc.) can be more economical when booked within that country. However, more and more modes of transportation are being uploaded into Concur every day. Travelers are encouraged to check and see if their needs can be met through a Concur operator, however, if this is not possible, travelers may book outside the Concur system.

TRAVEL MANAGEMENT COMPANY – RELATIONSHIP TO CONCUR

Q: Why does the University use the services of Travel and Transport?
A: There are several benefits the University derives through our current contract with Travel and Transport. For example: Travel and Transport is one of the largest travel agencies in the world, serving a diverse array of clients including other Universities and major corporations. The company has a staff of four to six employees dedicated to serving University of Nebraska travel needs, finding us the best rates, making emergency travel changes, etc. Travel and Transport has 24/7 domestic and international emergency help lines to get travelers prompt assistance when they find themselves stranded, to help change tickets, and to address other problematic travel situations that may arise.
Q: How was Travel and Transport selected as the NU travel management company?
A: Travel and Transport was selected as the University's travel provider through a competitive RFP process. We are currently in the midst of a multi-year contract with this travel management company.

Q: Why are Travel and Transport airfares sometimes more expensive than those I can find online?
A: Currently, at the University of Nebraska’s request, Travel and Transport does not upload airfares that are completely non-refundable.

Every year many travelers system-wide find themselves in a situation in which flights are cancelled or tickets go unused due to circumstances beyond the control of the traveler. The University's agreement with Travel and Transport includes provisions to put such tickets into a pool for future use by our travelers, thereby avoiding the full cost of cancelled tickets. With so many travelers, nonrefundable cancellations could add up to significant losses each year. The arrangement to pool unused tickets leads to significant cost savings for NU travelers each year.

In addition, the tickets that are offered through Travel and Transport include many other services including 24/7 customer service, waiver of various fees, risk messaging, and baggage/medical insurance that other third-party booking sites do not include.

TO WHOM DOES THE NU TRAVEL POLICY APPLY?

Q: Does the travel policy regarding reimbursements apply to non-employees such as campus visitors, prospective employees, contractors, speakers or Nebraska Medicine/clinical partners?
A: Yes. All travel expenses processed through the University for payment/reimbursement should be submitted via Concur, in accordance with the NU travel policy. Otherwise, expenses may not be reimbursed.

Q: What if I am traveling on a grant? Do I have to abide by the policy, including the use of Concur?
A: Yes. The Federal government is requiring universities to apply the same policies and costs across the institution regardless of state or federal funding source.

Q: What if a grant or funded contract has more lenient travel policies, and higher rates of reimbursement?
A: The new travel policy, including the use of Concur, applies to all University employees in travel status. Per federal guidelines and the principle of uniform guidance, the University may not authorize employees to charge outside parties, including the federal government, a higher rate than is required of its employees. Therefore, even if a grant or other funding source has a broader travel interpretation, the University's travel policy will apply.

MAKING TRAVEL ARRANGEMENTS USING CONCUR

Q: Do I have to make all my travel arrangements through Concur and/or Travel and Transport?
A: Travelers are strongly encouraged to book airline reservations through Concur and Travel and Transport. If you find a lower priced domestic airline ticket, outside of this booking method, you need to provide proof of the lower fare, including all fees and taxes. The proof needs to reflect the same day of purchase, as represented by the Concur or Travel and Transport quote.

Travelers are required to purchase international flights through Concur, unless relevant flights are unavailable through the software.
Q: To qualify for the lowest price do I have to take flights that require multiple stops or require exceedingly long layovers?
A: No. The NU travel policy assumes that consideration of the ‘lowest price’ takes into account the traveler’s business purpose, time spent in transit, and other special needs. There is a comment section in Concur that can be used to explain your choices.

Q: Do I have to pay for conference registration fees out of pocket, before a trip?
A: You have two options for conference payments.

One is to use a University assigned P-Card to sign up for conference registration fees. In this scenario, costs are carried on that card.

A second option is to use your personal credit card to sign up for a conference. Any pre-paid costs would be carried on your card. Reimbursement would be initiated following the conference.

Q: Can I still utilize hotels.com or Airbnb for hotels?
A: Yes, although hotel booking is an option and a suggested method for making travel arrangements within the Concur booking tool, it is not required. The Concur booking tool maintains contracted, University and government rates for hotels throughout the country and world. However, other sites, such as Airbnb and Hotels.com, may be used by travelers.

Q: Can I continue to book cars, such as Suburban’s, through UNL?
A: Yes. Check with the University first to obtain the car. If the size needed is not available, you may reserve with University car rental partners. See https://travel.unl.edu/new-big-10-car-rental-contract

Q: Will those doing fieldwork be exempted from some of the travel requirements, such as booking hotels in advance?
A: We realize that special circumstances sometimes require broad interpretations or revisions of policy. Please contact your specific campus travel staff to discuss in advance.

Q: Can I leave for my trip early, for personal time, if the airfare is the same or less than would otherwise have been the case?
A: Every opportunity to save the University money is encouraged. You will need to demonstrate that leaving early was a cost advantage, or at least the same price, to be reimbursed for your airfare.

**REIMBURSEMENTS USING CONCUR**

Q: Since accessing Concur is done through Firefly, will my travel delegate have access to all of my Firefly information?
A: No, when you designate an individual to assist you with your travel experience, he or she will only have travel access.

Q: I have already assigned my travel coordinator to book my airfare. Why is a delegate also necessary?
A: The role of delegates is to assist with your travel authorization and again with the reimbursement process. If you want him or her to reserve your airline, hotel, or car with Travel and Transport, that person must also be your travel arranger.
Q: Why can't my delegate submit my pre-trip request or expense report?
A: Your travel reimbursement is a formal record associated with you. It is in your best interest to review that record personally before it is submitted through Concur to make sure it is accurate. Your submission of the final report indicates that you have seen it and are satisfied with its contents.

Q: I use a credit card that accumulates air miles for the dollars I spend. Is that allowed?
A: Travelers are encouraged to purchase their airline tickets through Concur via a University credit card. Your credit card will not accumulate miles based on the purchase of tickets this way. However, if you are a member of an airline points program, any miles flown on that airline will go to your personal account. Another possibility is to make your flight reservations through Travel and Transport using your own credit card rather than the University card, thereby accumulating air miles based on the price of the ticket.

Q: What if I do not want to use my personal cellular phone to take pictures of receipts, especially if I am in an international zone with high phone access costs?
A: This feature is a perk within Concur, not a requirement. You can choose to scan receipts and upload them in Concur during your trip or afterwards.

Q: In the policy, there is a maximum on tips. Why? I am confused about whether the maximum is 20 percent, or $5.
A: The $5/day limit (which does not apply to student group travel) on tips for porters, baggage carriers, hotel staff and staff on ships is based on GSA per diem rates and is a recommended IRS guideline. All other tips (such as for meals) are capped at 20% of the total bill. This amount is currently the IRS acceptable standard for travel.

Q: Under a Blanket Travel Authorization (BTA), the policy states that a maximum 100-mile radius is permitted. It is more than 100 miles from Kearney to Lincoln/Omaha. So BTAs do not work for Kearney colleagues to travel to other campuses? This seems unfair to Kearney. Some of us are traveling to Lincoln 2 to 3 times a week.
A: Blanket Travel Authorizations (BTAs), are allowed for business travel with the same business purpose. This type of authorization is frequently used for Admissions, Extension and University Research personnel. BTA can be applied to any combination of travel within city limits, state limits OR within a 100-mile radius of a campus (which may involve crossing state lines).

STATE REQUIREMENTS THAT INFLUENCE RULES APPLIED THROUGH CONCUR

Q: For meal reimbursements, why I am confined to breakfast, lunch, and dinner only?
A: The “three meals a day” policy is a state required accounting policy. To comply with this rule the University is maintaining the total number of meals per day to three. If deemed medically necessary and supported by an ADA accommodation, travelers can be approved for more numbers of mealtimes.

Q: Many times I eat at restaurants that do not provide receipts. How can I get reimbursed?
A: The State of Nebraska will accept a copy of a credit card statement, cancelled check, or a subsequently acquired receipt. If a receipt is impossible to obtain, an affidavit will be accepted. Affidavits will mainly be accepted for international travel and on rare occasions, domestically. An affidavit can only be created by the traveler.

Q: What happens if I do not submit my expenses within 60 days of travel? Are there procedures for late submissions?
A: There are no procedures for late submissions. Nebraska State Statute 81-1174 states actual expenses incurred in the line of duty, shall be required to be presented for payment or reimbursement to your
campus Accounts Payable/Payable Services office, no later than sixty days, after the final day on which expenses were incurred.

In other words, expense reimbursements must be submitted through the University expense management tool (Concur) no later than sixty (60) calendar days after the expenses were incurred. This requirement cannot be waived.

To avoid missing the 60-day deadline, travelers could take advantage of the Concur Mobile Application. It will enable you to submit your receipts as you go; most expenses will be completed and submitted, before the traveler is back in the office.

**POLICY DEVELOPMENT & EVALUATION**

**Q:** How often will the NU travel policy and use of the Concur software be reviewed and/or evaluated?

**A:** The NU travel policy, like all University policies, will be continually reviewed for accuracy and effectiveness. As University, state and/or federal laws and procedures change, and as the Concur software system evolves, our travel policy will be adjusted accordingly. Further, there will be regular evaluations of traveler experiences with our vendors. All of these evaluation results will contribute to the development of better travel practices and provide feedback regarding contract renewals and new RFPs.

**Q:** What is the website address I can use to get updated policy information?

**A:** https://nebraska.edu/offices-policies/concur-help

**TRAVEL DELEGATES (“TRAVEL COORDINATORS”)**

**Q:** How do I create a travel request or an expense report for someone else (as a ‘travel coordinator’)?

**A:** In Concur, a travel coordinator is known as a delegate. An employee can be assigned as the delegate for another, giving them access to create travel requests and expense reports on their behalf.

**Q:** How do I assign someone as my delegate to prepare expense reports?

**A:** A traveler must designate another employee as their delegate and give them certain permissions.

- Permissions involved in creating an expense report include report creation, receipt viewing, and receiving emails regarding the expense reports.
- There are separate permissions to be granted if you are an approver and would like to give another person access to approve reports on your behalf.

**TRAVEL EXPENSE REPORTS**

**Q:** How do I access Concur Expense to do my expense report?

**A:** Log into firefly.nebraska.edu and click on the Concur Request, Booking, and Expense tile located on the home page under Business Applications.

**Q:** Are there training materials for Concur Expense?

**A:** Yes. Visit the Concur travel help website at https://nebraska.edu/offices-policies/concur-help

**Q:** How do I itemize a hotel expense?

**A:** Itemizing a hotel expense is demonstrated in the quick reference guide Itemizing Lodging Expense located on the Concur travel help website.
Q: The travel expense report was created without being linked to an approved travel request.
A: Follow the instructions on the Attach an Approved Request to an Expense Report tip sheet.

Q: Where can I find current Per Diem rates for Domestic and International cities?
A: Concur Expense has a built-in tool that calculates the Per Diem rates for locations throughout the world. By using the travel allowances section under the details link of an open expense report, the traveler creates an itinerary which then is used by the system to calculate per diem rates.

Q: How can I accurately calculate my mileage?
A: With a travel request, you will need to calculate the mileage manually (e.g.; using Google maps). For an expense report, you can enter the From and To locations, click the Mileage Calculator and your mileage is automatically and accurately calculated.

Q: How do I charge another funding source or multiple funding sources for an expense?
A: Allocate funds is demonstrated in the quick reference guide Allocate Expenses (Split Funding) located on the Concur travel help website.

Q: How does my airfare get charged to the correct funding source if I booked through Concur online booking tool or Travel and Transport?
A: Your cost center number will populate.

Q: A travel request was submitted for a Zero $ Trip and the trip has been taken. No expenses were incurred by the traveler or university/state college. What are the next steps?
A: No further action is required, as an expense report is unnecessary if no expenses are to be reimbursed to the traveler. If desired, the travel request can be closed/inactivated to remove it from the Active Requests screen.

Q: Expenses for a trip have been paid, but there is still a commitment in SAP. What action is needed to remove this commitment?
A: If the traveler is certain no additional expenses will be submitted with this report, open the request and click on Close/Inactivate Request to release any remaining commitments in SAP related to the trip.

Q: My expense report was returned for changes. How can I fix it without redoing it all?
A: Click on Expenses.
  • On the screen, the returned report will contain a top red banner. Note: If the specific report is not visible, select Report Library on the top right side, and then select the report from the listing.
  • The reason for return will appear in the box or in the comment field. If the explanation is long, open the report, click details and select comments. The entire explanation will be visible there.
  • Read the comment from the approver and fix the expense report accordingly.
  • Re-submit the report

Q: How do I print my expense report if needed?
A: Most needs for printing an expense report have been eliminated. You can elect to save the report as a PDF or email the report. However, if you do need a hard copy of the expense report:
  • Open the expense report
  • Click the print/email dropdown and select Travel & Expense Detail Report.
  • Click on print.
Q: Where can I see the status of my expense reimbursement?
A: Click the expense tab and locate the submitted expense.
  • Open the expense and click on the details dropdown menu.
  • Select approval flow.

Q: Can you search for a non-travel expense by GL code?
A: Yes, enter the code into the search box above the expense type list.

Q: I am creating my expense report and it is displaying a yellow icon ▶ along with a warning message. Can I still submit my expense report?
A: Yes, the warning is to alert you the traveler, your financial approver, and accounts payable that an exception has been noted (e.g.; total expenses exceed total pre-trip estimate). This will not prevent you from submitting the expense report.

Q: I received an error when submitting an expense report stating, “this report contains at least one itinerary with a single itinerary row. An itinerary is not valid until it has at least two rows.” How can I fix the existing itinerary?
A: Create one itinerary with at least two stops. Review the Itinerary Stops for Expense Reports reference guide for detailed instructions.

TRAVEL EXPENSE RECEIPTS

Q: What receipts are required?
A: Receipts are required for all expense types, with the exception of a mileage-only expense. Receipts should contain the following itemization details:
  • transaction date
  • name of merchant
  • transaction details (what was purchased)
  • a form of payment used
  • amount of purchase
  • an indication that the amount was paid

Q: Do I need to keep the paper copy of my receipts?
A: Only temporarily as the receipts are uploaded electronically to Concur. It is recommended to keep the receipts until the expense report has been processed and you have been reimbursed. Note: if your funding comes from a grant or a sponsored program, you should keep the paper receipts.

Q: I lost my receipt. Can I still be reimbursed for the expense?
A: If possible, contact the business (e.g.; hotel, car rental, etc.) to request a copy of the receipt. A Missing Receipt Affidavit can be submitted if needed. Creating a missing receipt affidavit is demonstrated in the quick reference guide Missing Receipt Affidavit located on the Concur travel help website.

Q: Can I email my receipts into Concur?
A: Yes. Send an email from your work email account with the attached receipt to receipts@concur.com. If you do not have access to your work email or you are a delegate for a traveler, send the receipt to the address above and put the traveler’s email in the subject line.
Q: Do the receipts associated with an expense report print out automatically if I print the expense report?
A: Yes, when selecting PDF, email or print the attached receipts will be included.

TRAVEL APPROVALS
Q: How do I know if there is an expense report needing my approval?
A: Approvers will be alerted with an email notification that an expense report is waiting for approval in Concur.
- When logging into Concur there is an Approval Box on the home page that will list reports waiting for approval.

Q: Can an approver click on a link in an email to approve a travel request or an expense report?
A: A link will be provided in the email workflow, however the approver will need to log into Concur and click on the Approvals tab. Another option would be to use the Concur mobile app to view and approve travel requests and expense reports.

TRAVEL – GENERAL QUESTIONS
Q: Does Concur timeout from inactivity?
A: Yes. Concur will log out the user after 120 minutes of inactivity.

Q: How does a traveler know if or when a Concur request or expense report has been approved?
A: An email notification is sent to the traveler whenever a request or expense has changed status. This notification includes the new status (approved, sent back to user, sent for payment, etc.) and will contain comments from the approver if it was returned for changes. Note: When multiple approval steps are needed (e.g. supervisor, financial, international or use of state/charter plane) only one email is sent after the last approval step.

Q: How do I set up the Concur Mobile app for creating expense reports or approving expense reports?
A: The Concur mobile app provides the flexibility of capturing electronic receipt images, creating expense reports and approving expense reports on your smartphone or mobile device.

Q: How can I download the Concur app to my mobile device?
A: From either the Google Play Store or the Macintosh App Store, search for SAP Concur.

Q: Can I as a delegate use the Concur mobile app to create a travel request or expense report for another employee?
A: No, the Concur mobile app is specific to you as a traveler.

Q: What is TripIt Pro?
A: A travel organization app for a mobile device. You can forward flight, hotel, or other travel confirmation emails to plans@tripit.com and TripIt will instantly create a master itinerary for each of your trips that you can access anytime, anywhere.